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JobberTopics

JULY 1987 • VOL. 132 NO. 6

for automotive jobbers, warehouse distributors and their salesmen

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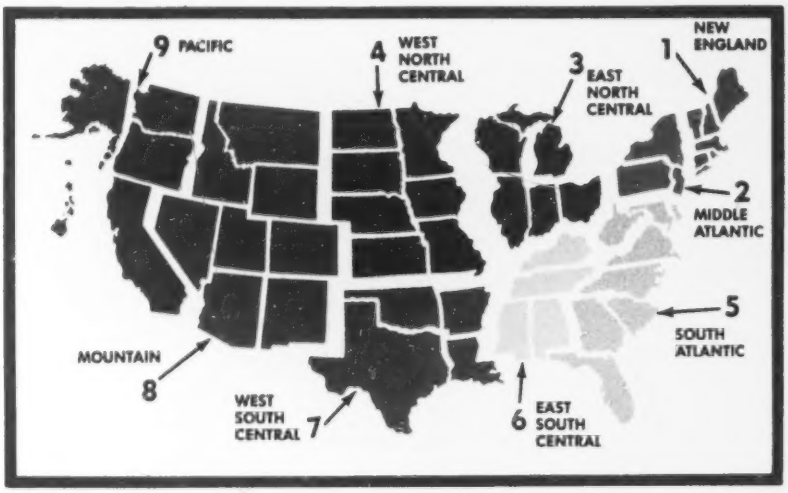

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Study Finds Jobbers 'Staying The Course' in Uneven Recovery

Nearly 33 percent report first quarter increases in dollar sales. Not quite 12 percent say collections are up and 25.3 percent report improved cash position . . .

By BILL ELLIS

"Although our overall business is up, there doesn't seem to be the same amount of traffic through the store that there used to be. Business seems a bit soft, not solid like before."

That comment, from a California jobber, gave helpful shading to JOBBER TOPICS' in-depth "How's Business" study, conducted each year for input to our *Annual Marketing Directory Issue*.

The comment, brief though it is, seems to catch the mood of many other jobbers across the country, 200 of whom took part in this survey.

Yes, the consensus seemed to be, they are doing business, they're selling parts and service, but there are few instances of explosive growth or runaway prosperity. The sense seems to be, rather, that of tight, hunkered-down operation that's staying the course but not taking undue risk.

Conducted by mail, among respondents who take part in our *monthly* "How's Business" studies, the *in-depth* study was structured like those of previous years. What we asked our panel was to compare their first quarter of operation in the current year with the first quarter of 1986. Specifically, we asked them to give us Up, Down or Same reports on dollar sales, unit sales, and collections, and Better, Worse or Same reports on their cash position. Finally, if sales were up, we asked them to tell us what class of trade contributed most to their increase.

In this article, as we have done in previous years, we provide reports and comments on our study, which we feel is a fairly good mirror image of the industry's economic status. To enhance usefulness of this presentation, we'll provide information at two different levels: national and regional. At the national level, of course, we'll be dealing with figures spread across all 50 states. At the regional level, we'll be dealing with figures for the nine census regions of the U.S.

So much for preliminaries. Now let's get into the meat of our study. Nothing happens, goes an old axiom of business, till you write up the sale. With that as rationale, let's talk about sales figures first—national sales figures. In dollar sales, countrywide, 32.8 percent of our panel said they were up while 38.4 percent reported them down. Not quite 29 percent said they were the same.

If sales were up or down, to what degree had they moved in either direction, we asked our panel? They were up an average of 8.5 percent, said our "up-reporting" jobbers. And the other direction? There the average was 11.7 percent.

Unit sales, that index which erases the inflation factor, presented a somewhat different picture. Fewer jobbers, 26.3 percent, said sales were up, but almost the same number, 38.3 percent, reported them down. Taking up the slack was the number saying sales were the same, which grew to 35.4 percent.

If unit sales were up, how high had they gone? Slightly over 7 percent on the average said respondents. And the down movement? That was registered at 11.9 percent.

Among customers contributing to improved jobber sales, Garages and Shops clearly outshone other catego-

Compare the first three months of 1987 to the first three of 1986

(Percent total respondents)

Dollar sales	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Regions
Up	42.9	22.6	33.3	34.5	36.4	30.0	10.0	69.2	42.9	32.8
Down	0.0	48.4	33.3	41.4	31.8	40.0	60.0	30.8	21.4	38.4
Same	57.1	29.0	33.4	24.1	31.8	30.0	30.0	0.0	35.7	28.8
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Percent "up"										
Average	10.0	9.8	7.1	9.2	6.3	7.0	n.a.	8.4	12.4	8.5
Median	7.5	10.0	7.0	6.0	7.0	7.5	n.a.	10.0	10.0	8.0
Percent "down"										
Average	n.a.	9.2	13.4	13.0	9.1	8.9	15.7	7.8	15.3	11.7
Median	n.a.	8.0	12.0	10.0	10.0	5.0	12.5	8.5	10.0	10.0

Compare the first three months of 1987 to the first three of 1988

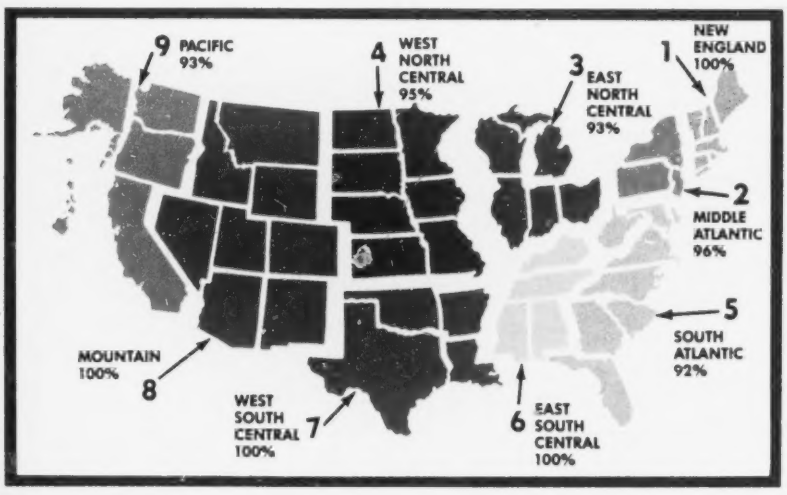
(Percent total respondents)

Unit Sales	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Regions
Up	28.6	20.0	19.1	20.7	31.8	25.0	20.0	58.3	35.7	26.3
Down	0.0	43.3	38.1	41.4	36.4	50.0	40.0	33.3	28.6	38.3
Same	71.4	36.7	42.8	37.9	31.8	25.0	40.0	8.4	35.7	35.4
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Unit sales "up"										
Average	7.5	10.8	4.5	6.2	5.6	3.5	7.3	7.7	11.6	7.1
Median	7.5	10.0	3.0	3.0	5.0	3.0	7.5	10.0	9.5	5.0
Unit sales "down"										
Average	n.a.	12.5	12.4	14.9	7.2	11.5	15.1	8.0	13.0	11.9
Median	n.a.	10.0	12.0	15.0	8.5	5.0	14.0	8.5	10.0	10.0

Compare the first three months of 1987 to the first three of 1986

(Percent total respondents)

Collections	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Regions
Up	0.0	12.9	4.8	13.8	13.6	15.0	15.0	15.4	7.2	11.9
Down	14.3	22.6	23.8	13.8	18.2	30.0	35.0	15.4	21.4	22.0
Same	85.7	64.5	71.4	72.4	68.2	55.0	50.0	69.2	71.4	66.1
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Collections "up"										
Average	n.a.	5.7	n.a.	4.3	9.3	4.7	n.a.	n.a.	n.a.	6.1
Median	n.a.	5.0	n.a.	5.0	10.0	5.0	n.a.	n.a.	n.a.	5.0
Collections "down"										
Average	n.a.	7.8	9.4	10.3	8.3	4.8	13.1	n.a.	15.0	9.8
Median	n.a.	7.5	10.0	10.0	10.0	5.0	10.0	n.a.	20.0	10.0



ries. Nearly 18 percent of the up-reporting jobbers claimed garage-and-shop business was the main reason why. Do-it-yourselfers were the runner-up category, but were named by only 7.4 percent of the panel. Service stations, once "king bee" in the jobber's market picture, were named by just 5.8 percent. "Other" customers (including fleets, industrial accounts, construction firms, farmers), got 4.7 percent of the vote. No customers were indicated by a large number of respondents, 71.6 percent, who chose not to answer the question.

The collections and cash position segments of the study provided perhaps the most hopeful signs that jobbers are "staying the course" during this fifth year of the country's economic recovery.

Slightly over 66 percent of the panel said collections were the same. Another 11.9 percent said they were up and 22 percent reported them down. All three readings were better than figures posted

(Continued)

in our year-ago study, comparing the 1986 first quarter with 1985's.

Up-reporting jobbers put the average collection improvement at 6.1 percent. The down-reporters said the average dropoff was 9.8 percent.

Cash position? Fully 70 percent said their cash position was either the same (44.7 percent) or better (25.3 percent). That left 27.9 percent who said their cash position was worse. As with collections, all three figures were improvements over conditions reported a year ago.

The foregoing, in some 15 paragraphs, is the view of our industry from the topmost elevation—the Big Picture, so to speak. Now let's focus in on the nine census regions, into which all 50 states are segregated. By studying both national and regional figures, readers should gain a picture of not only their own operating environment but how it compares with the national scene and conditions in the eight other regions.

Region 1—New England (CT, ME, MA, NH, RI, VT). Once typified by deserted textile mills and shutdown shoe factories, this far northeast corner is now aglow with relative business prosperity — and a remarkably low unemployment rate. Happily, automotive jobbers in this region are sharing in the good times.

In both dollar and unit sales, *no* jobbers reported decreases and substantial numbers reported increases: 42.9 percent for dollar sales and 28.6 percent for unit sales. Slightly over 57 percent said dollar sales were unchanged and 71.4 percent said unit sales were unchanged—scores unmatched by any other region!

While none of the Region 1'er said collections were up, the finding had to be seen in context with other statistical figures. Only 14.3 percent, for instance, said they were down, and a whopping 85.7 percent said they were unchanged, another "statement" no other region could make!

Further offsetting the zero were the cash position reports. "Better," said 35.5 percent; "worse," said absolutely no one; and the "same," said 50 percent.

Region 2—Middle Atlantic (NJ, NY, PA). "Busy one day, very slow the next. Cash business is very poor. Ratio is way off. Losing dealers. Good ones are going out of business due to illness or lost leases." This less than sanguine comment, from a New York jobber, tells it like it is in portions of this low-performing region.

The "up" reports on dollar and unit sales were down substantially—roughly 10 and 6 percentage points (respectively)—from the national norms. Collections? The "up," "down," and "same" reports were 12.9 percent, 22.6 percent, and 64.5 percent.

Asked about their cash position, 20 percent said it was better, 40 percent claimed it was worse, and another 40 percent reported it the same.

Region 2 jobbers, in common with those of Region 1 and Region 3, gave zero credit to DIYers for sales improvement. Recognized, instead, were Garages & Shops and Service Stations.

Region 3—East North Central (IL, IN, MI, OH, WI). "Winter's moderate temperatures caused a downward trend the first quarter. However, between stores, we're only down $2,500 for the quarter. Looks promising for the second." That contribution, from an Ohioan, probably was as good as any to cover Region 3, which yielded a mixed bag of "stats."

The cipher "3," appropriately, gave almost the complete picture of dollar sales in this region. Of reporting jobbers, 33.3 percent said they were up, 33.3 percent reported them down, and 33.4 percent reported them the same. Unit sales showed more diversity, with 19.1 percent reporting them up, 38.1 percent down, and 42.8 percent the same.

Except for New England, Region 3 had the fewest jobbers with increased collections: 4.8 percent. The number reporting them down, however, was only slightly above the national average (22 percent), and 71.4 percent had them unchanged.

Exactly half of Region 3'ers said

If sales were up, which class of trade contributed most to your increase?

	(Percent total respondents)									
	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Groups
Garages and Shop	25.0	20.0	15.4	10.3	22.2	9.1	10.0	23.1	33.3	17.9
Do-it-yourselfers	0.0	0.0	0.0	3.5	3.7	9.1	20.0	23.1	13.3	7.4
Service stations	25.0	13.3	0.0	3.5	7.4	4.6	0.0	0.0	6.7	5.8
Other	0.0	3.3	7.8	13.8	7.4	0.0	0.0	0.0	0.0	4.7
No answer	62.5	80.0	80.8	72.4	66.7	90.9	75.0	61.5	66.7	71.6
*										

Other
Fleets; industrial; construction; agriculture.

*Totals over 100 percent due to multiple mentions.

Compare the first three months of 1987 to the first three of 1986, was your cash position better, worse, or about the same?

(Percent total respondents)

	Reg. 1	Reg. 2	Reg. 3	Reg. 4	Reg. 5	Reg. 6	Reg. 7	Reg. 8	Reg. 9	All Regions
Better	37.5	20.0	23.1	13.8	29.6	31.8	10.0	46.1	40.0	25.3
Worse	0.0	40.0	19.2	27.6	25.9	36.4	40.0	15.4	20.0	27.9
Same	50.0	40.0	50.0	58.6	44.5	31.8	50.0	38.5	33.3	44.7
No answer	12.5	0.0	7.7	0.0	0.0	0.0	0.0	0.0	6.7	2.1
	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

their cash position was unchanged. Of the others, 23.1 reported it better and 19.2 percent said it was worse.

Region 4—West North Central (IA, KS, MN, MO, NE, ND, SD). In any word - association drill, "West North Central" would immediately bring to mind The Farm Belt, and all the sad circumstances that go with it. Still, our report from these seven states was not altogether bleak. Take collections, for instance. Of reporting jobbers, 13.8 percent said they were up, an identical number reported them down, and a thumping 72.4 percent termed them unchanged. All figures were better than national norms.

Cash position, in the "worse" and "same" categories, stacked equally well with national figures. In the "better" category, however, it did not. Only 13.8 percent reported their cash status better, compared for 25.3 percent for the country.

In dollar and unit sales, figures hit both above and below the national levels, but the deviations were generally not excessive.

Region 5—South Atlantic (DE, DC, FL, GA, MD, NC, SC, VA, WV). In this region, most of whose states form much of the eastern seashore, dollar sales make a good starting point. Reporting sales up were 36.5 percent. "Down", said another 31.8 percent, and unchanged, said an identical 31.8 percent. All figures bettered the national profile. Two of the three unit sales figures also surpassed national averages.

If Region 5 had respectable sales, it also had moderately good collections. Of the South Atlantic respondents, 13.6 percent reported them up, 18.2 percent said they were down, and 68.2 percent reported them unchanged.

Collection's first cousin, cash position, faired quite well also. Nearly 30 percent said it was better (vs. the all-region figure of 25.3 percent). Almost 26 percent reported it worse, and 44.5 percent said it was the same.

Region 6—East South Central (AL, KY, MS, TN). Of the 17 comments appended to our survey returns, three came from Kentucky jobbers. Two jobbers, as if reading one another's mind, commented on the strong March sales, which, they said, helped offset a slower January and February. The third jobber, not far removed—subject-wise—from his fellow panelists, suggested "maybe the weather" was slowing his sales. "Sunshine," he observed, "makes people move and spend."

In the "up" or "better" categories, Region 6 fell slightly below national averages in dollar and unit sales, but comfortably above those figures in collections and cash position. In contrast to its neighboring Region 7, Region 6 was—interestingly—in close agreement on collections but parted company on cash position.

Region 7—West South Central (AR, LA, OK, TX). Though the U.S. is said to be in a recovery mode, you couldn't prove it by an Oklahoma jobber, who sent us a grim report of what it's like in his corner of the West South Central. Said he: "This is a small town of 3,500 in western Oklahoma, the center of the Oil Patch and boom of the 80s. Cattle and farming have been number one since. Housing and trade are at a low. Of our three banks, one closed and one was sold and turned into a branch. Local savings & loan was also sold. Farmers and businessmen, in operation 40 or 50 years, are going bankrupt every day. Farm and pasture land that brought $1,000 to $2,500 an acre is selling at auction now for $200 to $500. I've been in the parts business in this area since 1932. It's very rough out here. This may sound as though we've had it, but the firms and farmers who don't owe much and can get by with FDIC will survive."

Redrawing this picture in bleak percentages was the Region 7 report on dollar sales. Of total respondents, only 10 percent reported sales up, while 60 percent said they were down and 30 percent reported them unchanged. The "up" figure was lower and down figure deeper than any other region.

The other indexes—unit sales, collections, cash position—remained in grim consistency with dollar sales.

(Continued on page 113)

The distance to the gate is inversely proportional to the time available to catch your flight . . . It is impossible to make anything foolproof because fools are so ingenious . . . Our customer's paperwork is profit; our own paperwork is loss . . . The first bug to hit a clean windshield lands directly in front of your eyes . . . One missed photographic opportunity creates a desire to purchase two additional pieces of equipment.

Study Finds . . .

(Continued from page 51)

Region 8—Mountain (AZ, CO, ID, MT, NV, NM, UT, WY). In dollar and unit sales, Region 8 was clearly the one that left other regions in a cloud of dust. Survey tabulations showed that 69.2 percent had dollar sales that were up. That left only 30.8 percent whose sales were down and no one whose sales were the same. In unit sales, the corresponding figures were 58.3 percent, 33.3 percent, and 8.4 percent.

Collections, reported up by 15.4 percent, and cash position, said to be better by 46.1 percent, smartly fell in line with sales.

Region 8, together with Regions 6, 7 and 9, reported DIYers playing a bigger role than service stations in improved jobber sales. Could be the wide open spaces of the Western U.S. still breed more self-repair types, proportionately, than other parts of the country.

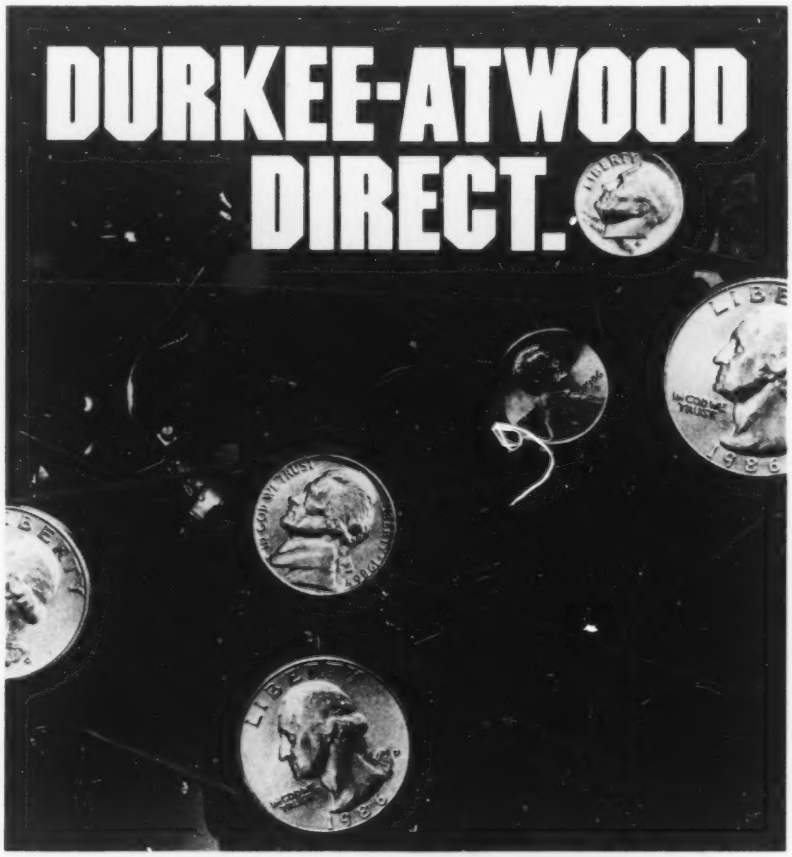
Region 9—Pacific (AK, CA, HI, OR, WA). In dollar and unit sales, Region 9 vied with New England as runner-up to top-performing Region 8. Of the Region 9 jobbers, 42.9 percent said dollar sales were up, while 35.7 percent reported unit sales up. In both dollar and unit sales, the number reporting them unchanged was the same: 35.7 percent. Over 21 percent said dollar sales were down while 28.6 percent reported unit sales down.

"Mixed" was the term for Region 9's collection picture. While only 7.2 percent reported their collections up, a close-to-national-average number reported them down and a reassuring 71.4 percent said they were the same.

For more solace, there were the cash position figures. A solid 40 percent (vs. 25.3 percent for the U.S.) reported their cash position to be better. Only 20 percent said it was worse and 33.3 percent reported it the same.

So, all-in-all, it looks as though the aftermarket—jobbers in particular—might be in a position to see a potentially brighter light ahead. Some good news, and some not so good news is what makes for an interesting business. Suffice to say, though, the jobbing business would be much easier to take with the brighter light! Perhaps we'll have better news to report next year.

A person is about as big as the things that make him angry.



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Warehouse Distributor (See Automotive Warehouse Dist.)

Wholesalers (See Automotive Wholesalers)

Automotive Wholesalers Among Largest in 1986

Based on Number of Branch Stores and Outside Salesmen

	BR.	Sales	Shops
1. A & B Automotive Centers, Inc., dba Main Auto Parts, Dayton, OH	25	12	6
2. Ace Auto Parts Co., Inc., St. Petersburg, FL	26	10	1
3. Acme Auto Supply, Inc., Hartford, CT	25	11	1
4. Arnold Motor Supply, Spencer, IA	19	46	19
5. Automotive Supply Co., Inc., Appleton, WI	11	10	6
6. Barnes Motor & Parts Co., Inc., Wilson, NC	24	30	7
7. Big A Auto Parts, Inc., Hollywood, CA	10	10	7
8. Big A Auto Parts, Inc., Lebanon, PA	22	24	2
9. Blankenship & Co., Inc., Marion, IL	16	16	4
10. Brookline Machine Co., Inc., Brighton, MS	6	11	6
11. Burdman Auto Parts, Inc., Kinksville, MO	30	28	1
12. Burton Auto Supply, Inc., Weslaco, TX	13	11	2
13. Chanen's Auto Supply Co., Quincy, IL	14	10	1
14. Crow-Burlingame Co., Little Rock, AR	60	59	4
15. Darling's Auto Parts, Bangor, ME	14	10	1
16. Dayton Warehouse Co., Fargo, ND	11	21	8
17. Dryden Oil Co., Inc., Baltimore, MD	13	124	—
18. Everson Co., Grand Forks, ND	19	15	1
19. Fochtman Motor Co., Inc., Petoskey, MI	12	13	3
20. Genuine Parts Co., Birmingham, AL	10	14	6
21. Genuine Parts Co., St. Louis Park, MN	12	14	4
22. Green Light Auto Store Div., Sub. Mid-America Ind., Inc., Fort Smith, AR	58	15	12
23. Hedahls, Inc., Bismark, ND	14	20	11
24. Hutchins Automotive Supply, Niagara Falls, NY	10	14	1
25. Inter-State Auto Supply Co., Elizabethtown, KY	17	22	9
26. Jarvis Auto Supply, Inc., Winfield, KS	11	10	1
27. Keenan Auto Parts Co., Heavy Duty Div., Albany, GA	30	18	18
28. Linkon's Auto Supply Co., Centralia, IL	30	23	4
29. Molin-Taylor, Inc., Buffalo, NY	22	10	3
30. National Auto Supply Co., Brentwood, MO	27	32	16
31. Northern Auto Supply Co., Div. of Northern Ind., Marshfield, WI	29	20	11
32. Norwood Distributors, Inc., Long Branh, NJ	8	13	9
33. O'Reilly Automotive, Inc., Springfield, MO	68	10	5
34. Republic Automotive, O.K. Auto Parts, Inc., Ironwood, MI	12	12	10
35. Robbins Auto Parts, Inc., Dover, NH	9	14	9
36. Rodefeld Co., Inc., Richmond, IN	15	15	12
37. Sanel Auto Parts, Inc., Concord, NH	27	27	3
38. Sieg Co., Davenport, IA	16	12	1
39. Sieg Nebraska Co., Omaha, NE	10	11	—
40. Slack Auto Parts Co., Inc., Gainesville, GA	11	10	6
41. Sturdevant's Inc., Wahpeton, ND	13	10	5
42. Western Auto Parts Co., Fargo, ND	11	20	8
43. Wharton & Barnard, Inc., Milford, DE	14	13	3
44. Womwell Automotive Parts Co., Inc., Lexington, KY	20	14	3
45. Woolwine Companies, Pratt, KS	11	12	3

Source: JOBBER TOPICS, Directory of Automotive Jobbers 1986-87.

Profile of the Franchised Dealer's Service And Parts Operation

	Average Dealership	All Dealers
Total Service and Parts Sales	$1,442,515	$ 36.2 Billion
Total Gross Profit as percent of Service and Parts Sales	38.2%	XX
Total Net Profit as percent of Service and Parts Sales	1.7%	XX
Total Number of Repair Orders Written	7,925	192 Million
Total Service and Parts Sales per Customer Repair Order	$ 150	XX
Total Service and Parts Sales per Warranty Repair Order	$ 100	XX
Number of Mechanics	9	222,600
Number of Service Bays	16	392,000
Total Parts Inventory	$ 400,000	$ 10 Billion
Average Customer Mechanical Labor Rate	$ 32	XX

Source: National Automobile Dealers Assn, Industry Analysis Division.

Franchised New Car Dealer Service and Parts

(Millions of Dollars)

	1985	1986	Percent Change
SERVICE LABOR SALES			
Customer Mechanical	5,437	5,965	9.7
Customer Body	2,432	2,505	3.0
Warranty	2,175	2,521	15.9
Sublet	1,188	1,331	12.1
Internal	2,003	2,129	6.3
Other	1,073	1,206	12.3
Total Service Labor	14,308	15,657	9.4
PARTS SALES			
Customer Mechanical	3,856	4,405	14.3
Customer Body	2,391	2,491	4.2
Wholesale	5,957	6,218	4.4
Counter	1,407	1,359	– 3.5
Warranty	2,641	3,170	20.0
Internal	2,024	2,120	4.7
Other	1,003	823	– 17.9
Total Parts	19,279	20,586	6.8
TOTAL SERVICE & PARTS	$33,587	$36,243	7.9

Source: National Automobile Dealers Assn, Industry Analysis Division.

State-by-State Look

State	Car Registration[1]	Truck and Bus Registration[1]	Total Registration[1]	Automotive Distributors/ Outlets[2]
Ala.	2,417,000	1,044,000	3,461,000	607
Alaska	217,000	131,000	348,000	39
Ariz.	1,662,000	691,000	2,353,000	345
Ark.	939,000	496,000	1,435,000	439
Calif.	15,384,000	4,310,000	19,703,000	2,437
Colo.	2,027,000	742,000	2,769,000	415
Conn.	2,377,000	160,000	2,537,000	409
Del.	383,000	102,000	485,000	69
D. of C.	328,000	17,000	345,000	23
Fla.	8,142,000	2,207,000	10,349,000	1,423
Ga.	3,375,000	1,311,000	4,686,000	779
Hawaii	589,000	83,000	672,000	96
Idaho	528,000	334,000	862,000	190
Ill.	6,137,000	1,648,000	7,785,000	1,426
Ind.	3,035,000	1,055,000	4,090,000	815
Iowa	1,988,000	776,000	2,764,000	613
Kan.	1,490,000	681,000	2,171,000	447
Ky.	1,777,000	864,000	2,641,000	557
La.	2,079,000	975,000	3,054,000	512
Maine	641,000	220,000	861,000	209
Md.	2,771,000	588,000	3,359,000	382
Mass.	3,264,000	473,000	3,737,000	716
Mich.	5,762,000	1,425,000	7,187,000	1,321
Minn.	2,744,000	804,000	3,548,000	492
Miss.	1,375,000	435,000	1,810,000	352
Mo.	2,648,000	945,000	3,593,000	827
Mont.	382,000	246,000	628,000	157
Neb.	842,000	420,000	1,262,000	300
Nev.	502,000	194,000	696,000	81
N.H.	854,000	165,000	1,019,000	149
N.J.	4,428,000	498,000	4,926,000	840
N.M.	732,000	423,000	1,155,000	184
N.Y.	8,185,000	1,188,000	9,373,000	1,710
N.C.	3,314,000	1,222,000	4,536,000	947
N.D.	376,000	273,000	649,000	121
Ohio	6,972,000	1,359,000	8,331,000	1,412
Okla.	1,915,000	1,000,000	2,915,000	458
Ore.	1,561,000	662,000	2,223,000	317
Pa.	5,980,000	1,360,000	7,340,000	1,456
R.I.	517,000	98,000	615,000	125
S.C.	1,715,000	561,000	2,276,000	438
S.D.	429,000	248,000	677,000	120
Tenn.	3,070,000	844,000	3,914,000	661
Texas	8,606,000	4,006,000	12,612,000	2,009
Utah	733,000	372,000	1,105,000	172
Vt.	315,000	103,000	418,000	103
Va.	3,838,000	625,000	4,463,000	644
Wash.	2,652,000	1,115,000	3,767,000	586
W. Va.	860,000	379,000	1,239,000	211
Wis.	2,528,000	753,000	3,281,000	576
Wyo.	286,000	221,000	507,000	91
TOTAL	135,671,000	40,861,000	176,532,000	29,808

at the Wholesaler's Market

Vehicles Per Wholesaling Outlet[3]	Car Dealers[4]	Truck & Trailer Dealers[4]	Service Stations & Truck Stops[5]	Auto Repair Shops[6]	State
5,702	310	230	1,076	1,691	Ala.
8,923	N/A	N/A	142	164	Alaska
6,820	293	191	642	1,507	Ariz.
3,269	160	96	1,004	1,083	Ark.
8,085	1,520	782	5,358	14,991	Calif.
6,672	258	151	874	1,944	Colo.
6,203	323	152	1,214	1,577	Conn.
7,029	10	5	181	299	Del.
1,500	66	44	128	403	D. of C.
7,273	727	391	2,534	5,757	Fla.
6,015	486	286	1,585	2,825	Ga.
7,000	43	41	306	567	Hawaii
4,537	530	317	391	484	Idaho
5,459	128	86	3,134	5,030	Ill.
5,018	1,083	559	1,730	2,577	Ind.
4,509	559	364	1,742	1,526	Iowa
4,857	334	203	1,193	1,312	Kan.
4,741	320	250	1,464	1,355	Ky.
5,965	320	231	1,103	2,035	La.
4,120	518	236	465	537	Maine
8,793	291	194	1,206	1,798	Md.
5,219	164	95	2,074	3,104	Mass.
5,441	790	416	2,484	3,887	Mich.
7,211	503	293	1,886	1,706	Minn.
5,142	529	331	635	984	Miss.
4,345	275	167	1,974	2,659	Mo.
4,000	160	105	486	483	Mont.
4,207	597	348	1,079	944	Neb.
8,593	159	111	234	492	Nev.
6,839	259	163	366	498	N.H.
5,864	141	86	2,892	4,052	N.J.
6,277	630	288	481	721	N.M.
5,481	120	88	4,618	8,214	N.Y.
4,790	63	48	1,869	2,746	N.C.
5,364	1,251	536	461	292	N.D.
5,900	966	566	3,067	5,039	Ohio
6,365	380	243	1,168	1,483	Okla.
7,013	267	179	814	1,375	Ore.
5,041	1,247	640	4,010	5,996	Pa.
4,920	71	50	344	544	R.I.
5,196	266	144	1,026	1,357	S.C.
5,642	149	73	523	357	S.D.
5,921	392	321	1,407	2,099	Tenn.
6,278	1,290	724	3,556	8,481	Texas
6,424	125	84	526	744	Utah
4,058	498	283	220	261	Vt.
6,930	92	50	1,685	2,496	Va.
6,428	184	98	1,197	2,148	Wash.
5,872	633	392	722	630	W. Va.
5,696	209	123	2,040	1,925	Wis.
5,571	88	59	312	302	Wyo.
5,775	20,777	11,913	71,541	115,481	TOTAL

Sources: [1]U.S. Federal Highway Administration, Tables SS83-4, 1986. [2]JOBBER TOPICS Circulation File (1987). [3]Vehicles per wholesaling outlet obtained by dividing outlets into total registration. Final figure is average for all states. [4]R. L. Polk & Co. Marketing Services Division (1987). [5]SUPER SERVICE STATION Circulation File (1987). Figures represent service stations and truck stops qualified for automotive repair and service work. [6]U.S. Census of Business (1982).

ASIA Wholesaler's Costs, Income And Profit as Percentage of Sales

	Median Wholesaler (1985)
SALES	100.00%
Cost of Goods Sold	65.67%
GROSS MARGIN OF PROFIT (Sales minus cost of goods sold)	34.34%
SELLING EXPENSE (Includes: Advertising & sales promotion; salesmen's salaries, commission, travel, etc.; sales supervisory salaries & commissions; countermen's salaries & commissions.)	10.69%
DELIVERY EXPENSE (Includes: Delivery salaries (including bonuses); vehicle operating expenses; depreciation—vehicle equipment; transportation out and parcel post.)	2.65%
STORE AND OCCUPANCY EXPENSE (Includes: Stockroom wages; heat, light & water; rent (or depreciation.))	5.50%
GENERAL AND ADMINISTRATIVE EXPENSE (Includes: Executive salaries & bonuses; supervisory salaries & bonuses; clerical salaries, wages & bonuses; purchase & inventory control salaries & wages; travel & trade relations; office supplies & postage; misc. G & A expense (dues & donations); EDP equipment or purchase service cost; telephone & telegraph; legal & professional fees; general taxes; general insurance; employee benefits.)	14.16%
TOTAL OPERATING EXPENSES	33.57%
NET OPERATING INCOME	0.52%
TOTAL OTHER INCOME	1.39%
TOTAL INCOME	2.23%
TOTAL OTHER EXPENSES	1.28%
NET PROFIT BEFORE MACHINE SHOP	1.13%
NET PROFIT FROM SHOP OPERATIONS	.51%
NET PROFIT BEFORE TAXES	1.52%
NET PROFIT AFTER TAXES	1.13%

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis,* published by the Automotive Service Industry Association.

The Meaning of Median Figures

Readers will notice that a number of tables in this special section make use of median figures instead of, say, average figures. Many modern business analysts believe that medians are more precise than averages—hence a growing trend toward the use of medians.

The word "median," according to the dictionary, refers to the middle. In a statistical sampling, the word median refers to that firm whose figures place it in the exact middle of the sampling. In a study of the business costs of a thousand automotive wholesalers, for example, the median wholesaler would be that firm in the middle; five hundred of the firms would have higher costs and five hundred would have lower costs—in graduated figures working away from that median or middle firm.

Quick Profile of the Median ASIA Wholesaler

Figures Apply to 1985

SALES PERFORMANCE	
Average Sales Volume	$1,641,590
Percent Increase Over Previous Year	0.64%
Cash Sales as Percent of Total Sales	29.00%
PROFITABILITY PERFORMANCE	
Gross Profit Margin as Percent of Net Sales	34.34%
Net Profit Before Taxes as Percent of Net Sales	1.52%
Net Profit After Taxes as Percent of Net Sales	1.33%
ASSET MANAGEMENT	
Average Inventory Turnover Rate	2.90 (times)
Number of Days Average Inventory Carried	126 (Days)
Days Credit Sales in Accounts Receivable	42 (Days)
FINANCIAL MANAGEMENT[1]	
Net Worth to Total Indebtedness	1.78 to 1
Current Ratio	3.57 to 1
Accounts Receivable to Accounts Payable	1.12 to 1
OPERATING EXPENSES	
Total Operating Expenses to Net Sales	33.57%
Total Payroll Expense as Percent of Net Sales	18.00%
PERSONNEL MEASUREMENTS	
Sales Volume Per All Non-Shop Employees	$92,890
Average Payroll Per All Non-Shop Employees	$15,990
MACHINE SHOP PERFORMANCE	
Shop Sales Per Shop Employee	$28,950
Average Wage or Salary Per Shop Employee	$18,000
Gross Profit Margin as Percent of Shop Labor Sales	39.07%
Shop Net Profits to Shop Labor Sales	13.32%

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association. [1]These ratios relate dollars to dollars. In the ratio of accounts receivable to accounts payable, for instance, the median wholesaler had $1.12 of accounts receivable for every $1.00 of accounts payable.

ASIA's Median Wholesaler: How Well He Managed His Assets

	Median Wholesaler (1985)
Percent of Companies On LIFO	35.51%
Change in Inventory During Year	2.65%
Average Inventory Turnover Rate	2.90 (Times)
Number of Days Average Inventory Carried	126 (Days)
Turn and Earn Profitability Index	95.21%
Cash Sales as a Percent of Total Sales	29.00%
Days of Credit Sales in Accounts Receivable	42.0 (Days)
Ratio of Sales to Net Working Capital	3.92 to 1
Ratio of Sales to Assets (Total Asset Turnover)	2.38 to 1[1]

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by Automotive Service Industry Association. [1]This ratio relates dollars to dollars. There were $2.38 of sales, for instance, to every $1.00 of assets.

Balance Sheet of Median ASIA Wholesaler—1985

	Median Wholesaler (1985)
ASSETS	
Cash and Marketable Securities	8.42%
Accounts & Notes Receivable, Trade, Net	20.88%
Inventory (End of Period)	54.13%
All Other Current Assets	2.70%
Total Current Assets	85.72%
Net Fixed & All Other Non-Current Assets	14.28%
Total Assets	100.00%
LIABILITIES AND NET WORTH	
Accounts & Notes Payable, Trade	20.01%
Other Notes Payable & Other Current Liabilities	6.37%
Total Current Liabilities	26.22%
Long Term Liabilities	14.90%
Total Liabilities	41.57%
Total Net Worth or Equity	58.88%
Total Liabilities & Net Worth	100.00%

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Leading Product Items As Reported by ASIA Jobbers

The following merchandise items proved to be "best sellers" for ASIA wholesalers during 1985. Each item contributed more than one percent to the average wholesaler's total sales volume.

1. Filters & Cartridges (all)
2. Paint, Thinner, Solvents
3. Belts & Hoses (all)
4. Starter Batteries
5. Exhaust System Parts (all)
6. Shocks, Levelers, Struts
7. Brake Shoes, Pads & Linings
8. Ignition Parts, Mechanical & Electronic
9. Spark Plugs
10. Water Pumps & Parts
11. Air Conditioners & Parts
12. Brake Cylinders (Master & Wheel)
13. Wire & Cable (all)
14. Alternators, Generators & Parts
15. Carburetors, Parts & Kits
16. Ball Joints, Control Arms
17. Gaskets
18. Motor Oil
19. Abrasives, Adhesives
20. Bearings (except engine)
21. Brake Drums, Rotors
22. Clutches, Parts
23. Hand Tools/Manuals
24. Engine Bearings
25. Sealed Beam Lights
26. Seals (all)
27. Wiper Blades, Arms
28. Safety Glasses
29. Starter Motors, Drive
30. Anti-Freeze
31. U-Joints & Kits
32. Tie Rod Ends & Idler Arms
33. Hand Tools/Power
34. Fuel Pumps, Kits & Parts
35. Timing Gears, Chains, Sprockets

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Number of Workers, by Category Of Median ASIA Wholesaler

Job Classification	Average Number Employed
Outside Salesmen	2.00
Countermen	6.00
Deliverymen	3.00
Stockroom Employees	3.1
Executives	2.00
General & Administrative Clerical Employees	3.00
Non-Shop Employees	18.00
Shop Employees	3.00

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

ASIA's Median Wholesaler: How His Profits Scored in 1985

	Median Wholesaler (1985)
Gross Profit Margin as Percent of Net Sales	34.34%
Net Profit (Before Taxes) as Percent of Net Sales	1.52%
Net Profit (After Taxes) as Percent of Net Sales	1.13%
Net Profit (Before Taxes) as Percent of Total Assets	3.81%
Net Profit (After Taxes) as Percent of Total Assets	3.01%
Net Profit (Before Taxes) as Percent of Net Worth	6.80%
Net Profit (After Taxes) as Percent of Net Worth	5.77%
Net Profit (Before Taxes) as Percent of Net Working Capital	6.70%
Net Profit (After Taxes) as Percent of Net Working Capital	5.53%
Shop Gross Profit as Percent of Shop Labor Sales	39.07%
Shop Net Profit as Percent of Shop Labor Sales	13.32%

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Productivity Measures For Staff of ASIA Jobber

Average Number of Non-Shop Employees	18.0
Merchandise Sales Per Non-Shop Employee	$92,890
Merchandise Gross Margin Per Non-Shop Employee	$30,850
Taxes & Benefits Per Non-Shop Employee	$ 2,630
Total Payroll Expense as Percent of Merchandise Sales	18.00%
Total Payroll Expense as Percent of Merchandise Gross Margin	53.68%
Total Compensation as Percent of Merchandise Sales	20.52%
Total Compensation to Merchandise Gross Margin	61.12%

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Expense Item Statement For Median ASIA Jobber

	Percent of Net Sales (1985)
Advertising and Sales Promotion	.62%
Salesmen's Salaries, Travel, etc.	2.17%
Inside Countermen's Salaries & Commissions	5.32%
Total Selling Expenses	10.69%
Delivery Salaries (including bonuses)	1.11%
Vehicle Operating Expense	.69%
Total Delivery Expenses	2.65%
Stockroom Wages	1.04%
Heat, Lights and Water	.85%
Rent (or depreciation)	1.95%
Repairs & Maintenance (building)	.27%
Depreciation (store fixtures and equipment)	.49%
Total Store & Occupancy Expenses	5.50%
Executive Salaries and Bonuses	2.88%
Supervisory Salaries and Bonuses	1.67%
Clerical Salaries and Wages	1.87%
Purchasing & Inventory Control Salaries and Wages	none
Office Supplies and Postage	.43%
EDP Equipment and/or Purchase Service Cost	.84%
Telephone and Telegraph	.75%
Taxes, General	.52%
Taxes, Payroll	1.60%
Insurance, General	.71%
Employee Benefits	1.23%
Total General & Administrative Expenses	14.16%
TOTAL OPERATING EXPENSE	33.57%

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Automotive Wholesaler Failures

Year	Number	Liabilities	Year	Number	Liabilities
1946	1	$ 47,000	1967	91	$9,211,000
1947	17	456,000	1968	72	8,411,000
1948	26	892,000	1969	49	7,383,000
1949	44	1,150,000	1970	61	4,617,000
1950	55	1,083,000	1971	59	8,478,000
1951	23	330,000	1972	46	4,452,000
1952	22	529,000	1973	55	10,295,000
1953	28	1,010,000	1974	60	7,024,000
1954	39	1,015,000	1975	65	12,122,000
1955	53	1,523,000	1976	57	30,272,000
1956	41	2,699,000	1977	48	27,849,000
1957	45	1,470,000	1978	43	6,270,000
1958	42	1,275,000	1979	48	51,445,000
1959	50	1,744,000	1980	109	47,730,000
1960	77	4,191,000	1981	112	29,682,000
1961	89	3,744,000	1982	138	74,386,000
1962	80	4,696,000	1983	183	59,151,000
1963	74	3,917,000	1984	241	33,319,000
1964	94	3,452,000	1985	272	64,710,000
1965	84	4,488,000	1986	297	138,537,000[1]
1966	98	5,632,000			

Source: Economic Analysis Dept., Dun & Bradstreet Corp. [1]Preliminary figures.

ASIA Jobber's Operating Costs As Percent of Gross Margin

	Median Wholesaler (1985)
Total Selling Expenses as Percent of Net Sales	10.69%
Total Selling Expenses as Percent of Gross Margin	29.32%
Total Delivery Expenses as Percent of Net Sales	2.65%
Total Delivery Expenses as Percent of Gross Margin	8.10%
Total Store & Occupancy Expenses as Percent of Net Sales	5.50%
Total Store & Occupancy Expenses as Percent of Gross Margin	15.39%
Total General & Administrative Expenses as Percent of Net Sales	14.16%
Total General & Administrative Expenses as Percent of Gross Margin	40.31%

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Key Business Ratios For ASIA's Median Wholesaler[1]

	Median Wholesaler (1985)
Ratio of Net Worth to Total Indebtedness	1.78 to 1
Ratio of Total Assets to Net Worth	1.53 to 1
Ratio of Sales to Net Worth (Turnover of Net Worth)	3.98 to 1
Ratio of Current Assets to Current Debts	3.57 to 1
Ratio of Accounts Receivable to Accounts Payable	1.12 to 1

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association. [1]All these ratios relate dollars to dollars. In the ratio of sales to net worth, for instance, the median wholesaler had $3.98 of sales for every $1.00 of net worth.

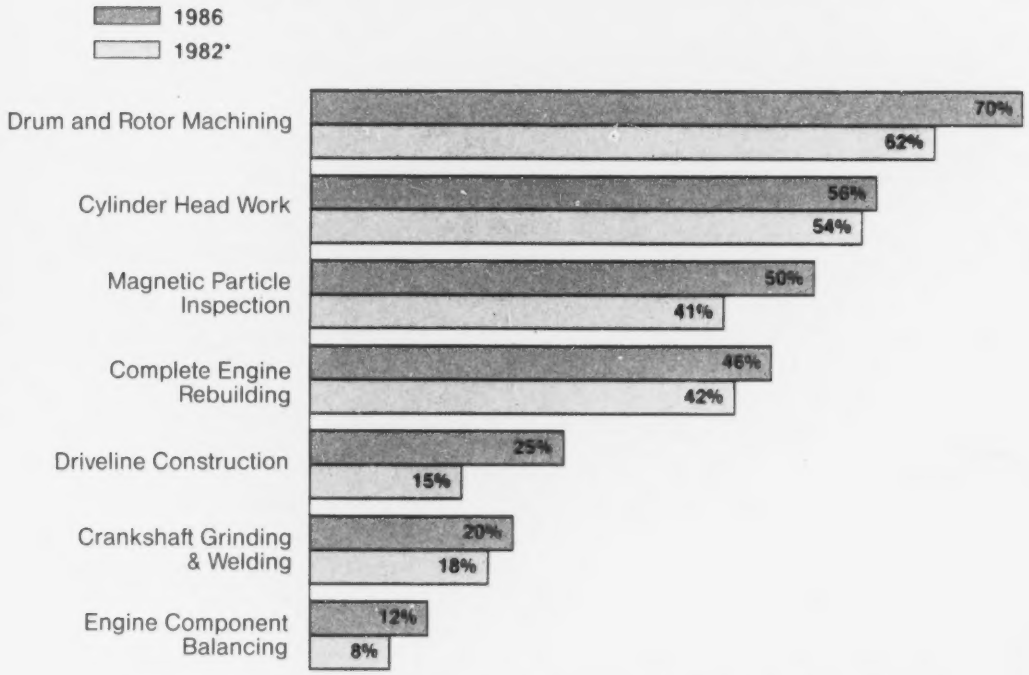
ASIA Wholesaler's Shop Profit As Percent of Labor Sales—1985

	Median Wholesaler (1985)
SALES—SHOP LABOR	100.00%
Cost of Shop Labor Sales (Salaries, Wages & Bonuses)	60.89%
GROSS PROFIT ON SHOP LABOR SALES	39.07%
All Other Shop Expenses (Overhead, Depreciation, Repairs & Maintenance, Supplies, etc.)	23.82%
NET PROFIT FROM SHOP OPERATIONS	13.32%

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

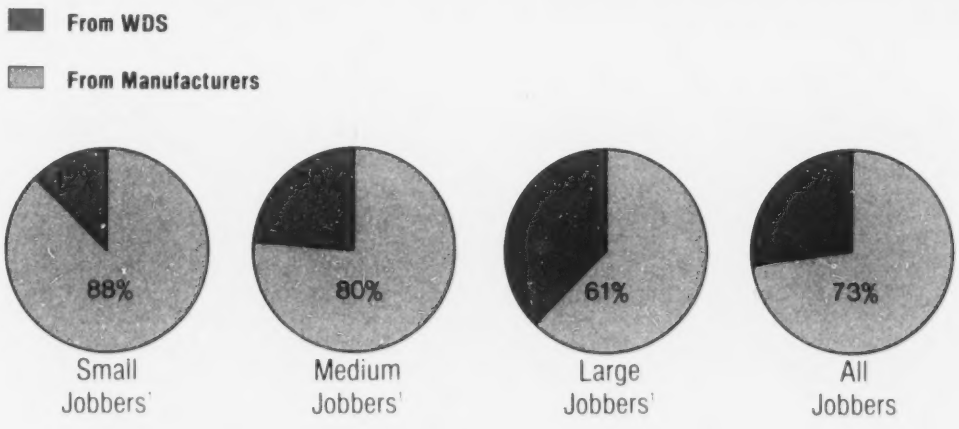
Machine Shop Operations Performed By Jobbers In Their Own Shops

(Percent of Forum Survey Respondents)



Source: JOBBER TOPICS Forum Report—June, 1986. *Previous Forum Report.

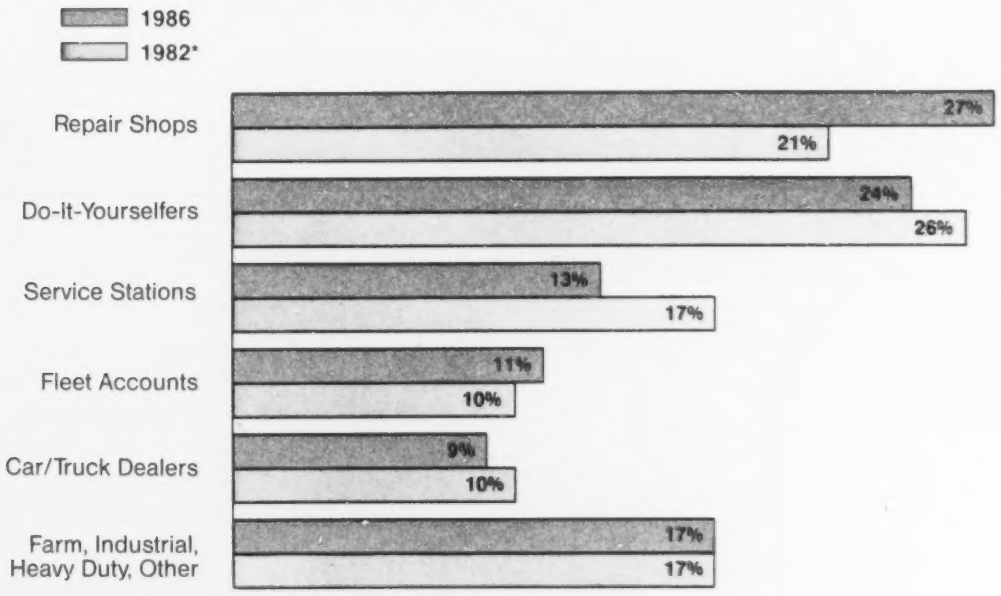
Where Jobbers Purchase Merchandise



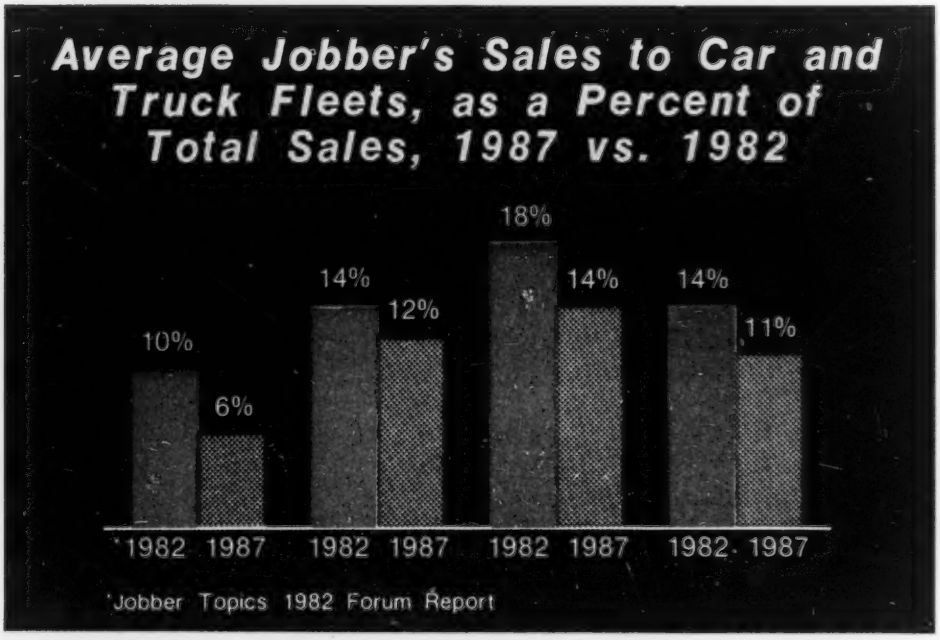
Source: JOBBER TOPICS Forum Study of September 1986. 'In Forum Studies, Small Jobbers have annual sales volume under $350,000; Medium Jobbers have sales of $350,000 to $750,000; and Large Jobbers have sales over $750,000.

Jobber's Market For Machine Shop Service

(Percent of Forum Survey Respondents)



Source: JOBBER TOPICS Forum Report—June, 1986. *Previous Forum Report.



Manufacturers' Average Annual Cost To Attend Automotive Shows and Meetings

1986 vs. 1980

Source: Forum Survey Report on Manufacturers' View of Shows and Meetings, published in March 1987 JOBBER TOPICS. 1980 figures are from Forum Survey Report published in September 1980 JOBBER TOPICS. [1]Entertainment figure not available for 1980.

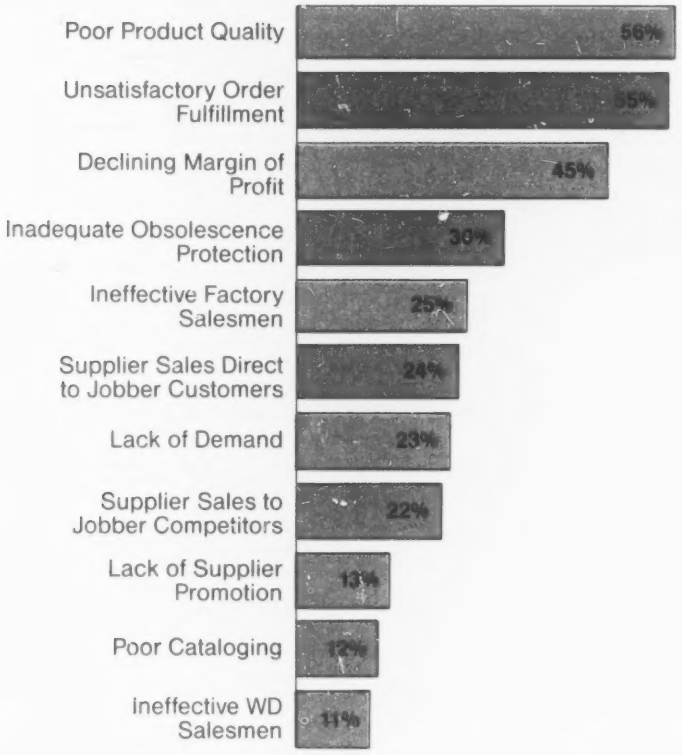
Where Warehouse Distributors Advertise

(Percent of Forum Survey Respondents)

Source: Forum Survey Report on WD Marketing Practices, published in August 1986 JOBBER TOPICS.

Most Frequent Reasons Jobbers Change Product Lines

(Percent of Forum Survey Respondents)



Source: Forum Survey Report on Why Jobbers Change Lines, published in October 1986 JOBBER TOPICS.

Number of Lines and Part Numbers For Average and Median Jobber

	Small Jobber[1]	Median Jobber[1]	Large Jobber[1]	All Jobbers
Lines Carried				
Average Jobber	64	82	125	99
Median Jobber	50	65	100	90
Part Numbers Carried				
Average Jobber	9,240	20,102	34,801	26,851
Median Jobber	7,500	14,000	25,000	20,000

Source: Forum Survey Report on Why Jobbers Change Lines, published in October 1986 JOBBER TOPICS. [1]In Forum Studies, Small Jobbers have annual sales volume under $350,000; Median Jobbers have sales of $350,000 to $750,000; and Large Jobbers have sales over $750,000.

Average Miles Per Vehicle by Year

	PASSENGER VEHICLES			TRUCKS			
	Passenger Cars	Motor-cycles	Buses	Single Units	Combi-nations	All Trucks	All Motor Vehicles
1985	9,827	2,204	11,678	10,039	60,418	11,737	10,019
1984	9,809	2,190	11,529	9,974	61,031	11,664	9,969
1983	9,641	2,149	11,521	9,705	52,424	11,178	9,732
1982	9,167	2,612	11,872	11,064	49,847	12,395	9,637
1981	9,002	2,573	11,953	11,028	47,023	12,340	9,484
1980	9,135	3,144	12,103	10,070	42,705	11,433	9,410
1979	9,485	4,000	11,732	9,184	49,664	10,810	9,580
1978	10,046	4,500	12,143	9,249	49,267	10,974	10,059

Source: U.S. Department of Transportation, Federal Highway Administration, Table VM-1.

Leading Product Groupings As Reported by ASIA Jobbers

The following product "families" or lines proved to be the "best sellers" for ASIA wholesalers during 1985. Lines are ranked according to the dollar volume of sales generated.

1. Paint, Body & Equipment (all)
2. Ignition System Parts (all)
3. Starting, Generating, Electrical (all)
4. Brake System Parts (all)
5. Chassis, Steering, Suspension (all)
6. Filters & Cartridges
7. Belts & Hoses (all)
8. Exhaust System Parts (all)
9. Cooling & Heating System Parts
10. Engine Parts (Internal)
11. Chemicals
12. Fuel System Parts
13. Drive Train Components
14. Hand Tools
15. Gaskets (all)
16. Motor Oil
17. Bearings (except engine)
18. Lighting System
19. Seals (all)

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

ASE Testing and Certifying of Mechanics (1972-1986)

Total Registered, excluding repeaters	497,162
Total Actually Taking tests, excluding repeaters	442,605
Total Passing Tests, including expired certifications	359,479
Total Currently Certified, excluding expired certifications (Net)	194,760
—Total Currently Certified in either all automotive or all truck areas	44,627
—Total Currently Certified in all auto and all truck	1,860
(Total also Currently Certified in Body Repair and Painting and Refinishing—all 16 areas)	375
Number of Regular Tests Taken	2,261,971
Number of Regular Tests Passed	1,469,284
Number of Recertification Tests Passed	336,091

Source: The National Institute for Automotive Service Excellence.

PBE Wholesalers' Cost of Doing Business, as Reported by ASIA

Median Figures—Based on 1986 Operations and Expressed as Percentage of Total Sales

NET SALES (After Returns & Allowances)	100.0%
Cost of Sales—Merchandise	64.2%
Gross Margin of Profit—Merchandise	35.8%
Total Operating Expenses (All Salaries, Sales Expenses, Delivery, G & A, etc.)	33.6%
Net Operating Income	1.7%
Total Other Income (Interest Earned, Gain from Sales of Assets, etc.)	.9%
Total Other Expenses (Include Cash Discounts Allowed, Interest Expense, Bank Charges, Loss on Sale of Assets, etc.)	.4%
Net Profit Before Taxes	2.4%
Federal, State and Local Income Tax	.3%
Net Profit After Taxes	2.0%
DETAILED EXPENSE ITEMS	
Executive Salaries & Bonuses	2.9%
Salaries, Commissions & Bonuses (Salesmen & other employees)	15.1%
Advertising and Sales Promotion	.4%
Vehicle Expenses (Include delivery expenses, salesmen's cars, other company operated vehicles)	1.0%
Transportation Out & Parcel Post	.3%
Donations, Dues, Subscriptions, etc.	.1%
Professional Fees (Including Legal, Accounting, etc.)	.4%
Bad Debts Less Recoveries	.4%
Leasing Costs (Office Equipment)	.2%
Depreciation—Store Fixtures & Equipment	.6%
Depreciation (Vehicle Equipment)	1.1%
EDP Depreciation, Leasing and/or Purchased Service Costs	1.0%
Travel & Trade Relations	.4%
Utilities (Heat, Lights, Water)	.4%
Telephone	.5%
Insurance	1.4%
Office Supplies and Postage	.4%
Rent (or Depreciation)	2.0%
Repairs and Maintenance—Building	.5%
Taxes, General	.3%
Taxes, Payroll (For all Employees)	1.4%
Employee Benefits (Includes Profit Sharing, Pension Fund, Group Insurance, & Employee Relations)	.8%
Additional Expenses	.3%
TOTAL OPERATING EXPENSES	33.6%

Median Sales for all reporting PBE Wholesalers—$1,294,262

Source: 1986 Edition of Cost of Doing Business Study for ASIA PBE Wholesaler Division.

MEMA's 'Composite' Wholesalers

ASSETS	1986/85	1985/84	1984/83
Cash	7.5%	6.5%	7.1%
Accounts Receivable	21.3%	17.2%	17.6%
Inventory	46.6%	46.2%	46.7%
Total Current Assets	75.4%	69.9%	71.4%
Deferred Assets	24.6%	30.1%	28.6%
Total Assets	100.0%	100.0%	100.0%
LIABILITIES & NET WORTH			
Current Debt	34.9%	43.4%	38.0%
Long Term Debt	11.3%	12.6%	18.4%
Net Worth	53.8%	44.0%	43.6%
Total Debt & Net Worth	100.0%	100.0%	100.0%
PROFIT & LOSS STATEMENT			
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	69.6%	69.5%	68.3%
Gross Profit	30.4%	30.5%	31.7%
Expenses	28.7%	28.4%	29.2%
Net Profit After Taxes	1.7%	2.1%	2.5%
FINANCIAL RATIOS			
Collection Period—Days	31.6	26.8	28.4
Days Payables Outstanding	43.3	45.2	40.6
Quick Ratio	.82	.54	.65
Current Ratio	2.16	1.61	1.88
Inventory to Working Capital	115.2%	174.7%	140.0%
Inventory to Current Assets	61.8%	66.2%	65.5%
Current Debt to Inventory	74.9%	93.9%	81.3%
Current Debt to Net Worth	64.9%	98.8%	87.0%
Total Debt to Net Worth	85.7%	126.8%	128.3%
OPERATING RATIOS			
Gross Profit to Sales	30.4%	30.5%	31.7%
Net Profit to Sales	1.7%	2.1%	2.5%
Net Profit to Net Worth	7.8%	11.1%	12.7%
Net Profit to Working Capital	10.3%	18.4%	16.6%
Net Profit to Total Assets	4.2%	4.9%	5.5%
EFFICIENCY RATIOS—TIMES			
Net Sales to Net Worth	4.6	5.3	5.2
Net Sales to Working Capital	6.1	8.8	6.8
Inventory Turnover	3.7	3.5	3.3
Net Sales to Total Assets	2.5	2.3	2.3

Source: 1986 Edition of the *Automotive Distributor Trends & Financial Analysis*, published by the Motor & Equipment Manufacturers Assn.

MEMA's Profile of Average WD

ASSETS	1986/85	1985/84	1984/83
Cash	2.7%	6.7%	7.1%
Accounts Receivable	28.4%	28.9%	28.9%
Inventory	43.0%	45.9%	43.0%
Total Current Assets	74.1%	81.5%	79.0%
Deferred Assets	25.9%	18.5%	21.0%
Total Assets	100.0%	100.0%	100.0%
LIABILITIES & NET WORTH			
Current Debt	47.3%	50.7%	47.5%
Long Term Debt	10.4%	11.3%	11.6%
Net Worth	42.3%	38.0%	40.9%
Total Debt & Net Worth	100.0%	100.0%	100.0%
PROFIT & LOSS STATEMENT			
Net Sales	100.0%	100.0%	100.0%
Cost of Goods Sold	76.4%	77.0%	78.1%
Gross Profit	23.6%	23.0%	21.9%
Expenses	22.2%	21.1%	20.1%
Net Profit After Taxes	1.4%	1.9%	1.8%
FINANCIAL RATIOS			
Collection Period—Days	45.9	40.1	41.9
Days Payables Outstanding	56.4	55.8	54.6
Quick Ratio	.66	.70	.76
Current Ratio	1.57	1.61	1.66
Inventory to Working Capital	160.3%	149.0%	136.4%
Inventory to Current Assets	58.0%	56.3%	54.4%
Current Debt to Inventory	109.9%	110.5%	110.4%
Current Debt to Net Worth	111.8%	133.3%	116.0%
Total Debt to Net Worth	136.0%	162.0%	144.0%
OPERATING RATIOS			
Gross Profit to Sales	23.6%	23.0%	21.9%
Net Profit to Sales	1.4%	1.9%	1.8%
Net Profit to Net Worth	7.7%	13.4%	10.9%
Net Profit to Working Capital	12.1%	16.6%	14.1%
Net Profit to Total Assets	3.3%	5.1%	4.5%
EFFICIENCY RATIOS—TIMES			
Net Sales to Net Worth	5.4	6.9	6.2
Net Sales to Working Capital	8.4	8.5	8.0
Inventory Turnover	4.0	4.4	4.6
Net Sales to Total Assets	2.3	2.6	2.5

Source: 1986 Edition of the *Automotive Distributor Trends & Financial Analysis*, published by the Motor & Equipment Manufacturers Assn.

Operating Costs of Average WD As Percent of Net Sales: AWDA

Figures Apply to 1986 Operating Experience

	Percent of Net Sales
SALES	
Gross Sales, Merchandise	133.04%
Returned Sales & Allowances, Merchandise	- 26.68%
Cash Discounts Allowed	- 2.09%
Trade or Volume Discounts Allowed	- 4.27%
Total Reductions	- 33.04%
NET SALES	100.00%
COST OF GOODS SOLD	
Cost of Goods Sold	76.30%
Factory Transportation & Handling Charge	.19%
Cash Discounts Earned	- 1.41%
Lifo Cost (Benefit)	.10%
COST OF SALES	75.18%
GROSS MARGIN	24.82%
OPERATING EXPENSES	
Selling Expenses	4.37%
(These include: salaries and/or commissions for supervisors, countermen, sales trainers; salesmen travel and trade relations costs; vehicle operation and depreciation, suppliers; advertising and sales promotion; WATS or leased line to customers.)	
Delivery and Shipping Expenses	2.50%
(These include: salaries and/or wages for supervisors, drivers; drivers' travel costs; vehicle operation and depreciation; supplies; postage; transportation out.)	
Warehouse and Occupancy Expenses	5.78%
(These include: salaries and/or wages for supervisors, warehouse employees, clerical workers; supplies; heat, light, water; rent; depreciation of buildings, land improvements, leasehold improvements, and warehouse fixtures and equipment; repairs and maintenance for buildings, fixtures and equipment.)	
General and Administrative Expenses	8.90%
TOTAL OPERATING EXPENSES	21.55%
OPERATING INCOME	3.27%
OTHER INCOME	.83%
(This includes: cash discounts earned; interest received or accrued; gain on sales of assets; service bureau fees; rental income; dividends from subsidiaries; dividend income; other.)	
OTHER EXPENSE	1.64%
(This includes: cash discounts allowed; interest paid or accrued; employees' profit sharing, employees' pension fund expenses.)	
PRETAX INCOME	2.46%

Source: 1987 *AWDA Financial Analysis Report* of the Automotive Warehouse Distributors Assn.

Relative Size of State and Regional Wholesaler Associations

1986 Rank	Association	1986 Regular Members	1985 Rank
1	Texas	1,790	1
2	California	1,221	2
3	Illinois	879	3
4	Florida	838	4
5	Ohio	738	7
6	Pennsylvania	680	11
7	New England	655	8
8	New Jersey	640	5
9	Michigan	623	6
10	Alabama	501	9
11	Missouri/Alabama	500	10
12	Washington	468	12
13	North Carolina	467	11
14	New York	454	13
15	Kentucky	435	13
16	Oklahoma	426	14
17	Louisiana	390	16
18	Virginia	300	17
19	Indiana	285	16
20	Oregon	267	19
21	Iowa	265	22
22	North Dakota	260	32
23	Tennessee	250	21
24	Minnesota	247	23
25	Georgia	215	18
26	Chesapeake	200	20
27	Wisconsin	197	24
28	South Carolina	183	25
29	New Mexico	150	26
30	Arizona	134	27
31	Rocky Mountains	130	29
32	Mississippi	98	28
33	Arkansas	96	29
34	Nebraska	86	30
35	Idaho	68	31
36	West Virginia	45	33
37	Montana	34	34
38	Nevada	26	35
39	Hawaii	3	36
	TOTAL	15,244	

Source: August issue of JOBBER TOPICS.

AWDA Figures, for WD Net Profit, Turnover, Sales Per Employee

Company Size (By Dollar Vol.)	Average Net Sales Volume	Net Profit Before Taxes (Percent)	Days Sales Outstanding Accts. Rec. (Days)	Median Inventory Turns	Sales Per Employee (Dollars)
Under $4,000,000	$ 2,718,668	1.18%	41.60	2.80	$139,562
$4,000,000 to $7,000,000	5,244,489	1.81	47.65	3.26	161,518
$7,000,000 to $10,000,000	8,382,864	2.36	56.28	3.74	178,701
$10,000,000 to $15,000,000	11,929,878	2.92	49.45	3.81	182,219
Over $15,000,000	30,525,996	2.60	52.51	4.24	182,419
All Companies	$12,349,576	2.46%	49.29	3.60	$177,564

Source: 1987 *AWDA Financial Analysis Report* of the Automotive Distributors Assn.

Performance Measures For ASIA Warehouse Distributors

	Median Distributor (1986)
SALES PERFORMANCE	
Dollars of Net Sales	$5,908.45
Percent of Sales Change Over Prior Year	3.12%
Number of Manufacturers Represented	75.00
Number of Product Lines Represented	120.00
PROFITABILITY PERFORMANCE	
Gross Margin to Net Sales	24.13%
Net Operating Profit to Net Sales	2.8 %
Net Profit Before Taxes to Total Assets	4.71%
Net Profit Before Taxes to Net Worth	10.37%
Net Profit Before Taxes to Net Working Capital	11.03%
ASSET MANAGEMENT	
Average Inventory Turnover Rate	3.43 times
Days Sales in Accounts Receivable	50.58 days
Sales to Net Working Capital	4.74 to 1
Total Asset Turnover	2.26 to 1
FINANCIAL MANAGEMENT	
Net Worth to Total Indebtedness	112.00%
Total Assets to Net Worth	1.89 to 1
Turnover of Net Worth	4.5 times
Current Assets to Current Liabilities	2.26 to 1
Cash Plus Marketable Securities Plus Trade Receivables to Current Debt	.89 to 1
Accounts Receivable to Accounts Payable	1.20 times
OPERATING EXPENSE CONTROL	
Total Operating Expense to Net Sales	22.10%
Total Operating Expense to Gross Margin	89.11%
Selling Expense to Net Sales	3.97%
Delivery Expense to Net Sales	2.31%
Warehouse & Occupancy Expense to Net Sales	5.35%
General & Administrative Expense to Net Sales	9.84%
PERSONNEL PRODUCTIVITY	
Net Sales Volume Per Employee	$ 176.21
Gross Margin Per Employee	41.57
Net Sales Volume Per Outside Salesman	1,574.87
Total Payroll Expense as a Percent of Net Sales	12.37%
Total Payroll Expense as a Percent of Gross Margin	52.01%

Source: 1986 Edition of the *Cost of Doing Business Analysis for ASIA Automotive Warehouse Distributors*. Some figures in the above table relate dollars to dollars. The figures for "Sales to Net Working Capital," for instance, can be interpreted to mean there were $4.88 sales for every dollar of working capital.

How ASIA's Heavy Duty Distributors Measured Up in Sales, Profits, Etc.

Figures Apply to 1985

	Median Distributor 1985
SALES PERFORMANCE MEASURES	
Average Sales Volume (Merchandise Sales)	$2,415,680
Percent of Sales Change Over Previous Year	(Down) .17%
Cash Sales as Percent of Total Merchandise Sales	15.00%
PROFITABILITY PERFORMANCE MEASURES	
Gross Profit as a Percent of Net Merchandise Sales	34.57%
Net Profit (Before Taxes) as a Percent of Net Merchandise Sales	1.70%
Net Profit (After Taxes) as a Percent of Net Merchandise Sales	1.67%
ASSET MANAGEMENT MEASURES	
Average Inventory Turnover Rate	3.1 (Times)
Number of Days Average Inventory Carried	119 (Days)
Overall Average Collection Period	43 (Days)
FINANCIAL MANAGEMENT MEASURES	
Total Debt as a Percent of Net Worth	24.12%
Ratio of Total Assets to Net Worth	1.63 to 1[1]
Current Ratio (Assets to Liabilities)	2.02 to 1[1]
OPERATING EXPENSES	
Total Non-Shop Operating Expenses as a Percent of Net Merchandise Sales	31.27%
Total Non-Shop Operating Expenses as a Percent of Gross Profit From Merchandise Sales	94.81%
PERSONNEL MEASURES	
Sales Volume Per Non-Shop Employee	$169,120
Average Payroll Per Non-Shop Employee	$ 24,750
MACHINE SHOP PERFORMANCE	
Shop Sales Per Shop Employee	$ 31,410
Average Wage or Salary Per Shop Employee	$ 16,790
Gross Profit as Percent of Shop Labor Sales	37.73%
Shop Net Profit as a Percent of Shop Labor Sales	7.20%

Source: 1986 Edition of *Management Performance measurement for ASIA Heavy Duty Distributors*, published by the Automotive Service Industry Association. [1]Ratios relate dollars to dollars. In the ratio of total assets to net worth, for instance, there was $1.63 of total assets to every $1.00 of net worth.

Productivity Measures For Machine Shop of ASIA Jobber

	Median Wholesaler (1985)
Average Number of Shop Employees	3.0
Shop Sales Per Shop Employee	$28,950
Shop Gross Profit Margin Per Shop Employee	$10,160

Source: 1986 Edition of *Automotive Wholesaling Financial Operation and Performance Analysis*, published by the Automotive Service Industry Association.

Canadian Wholesalers Report Sales of $6.8 Billion in '86

Year	Vehicle Registrations	Year	Automotive Jobber Sales
1963	6,074,655	1963	$ 457,000,000
1964	6,457,850	1964	462,262,000
1965	6,698,778	1965	494,154,000
1966	7,035,261	1966	524,400,000
1967	7,495,203	1967	567,980,000
1968	7,877,547	1968	702,886,000
1969	8,254,160	1969	816,114,000
1970	8,497,339	1970	865,681,000
1971	9,022,136	1971	968,650,000
1972	9,619,400	1972	1,721,114,000
1973	10,295,000	1973	2,060,367,000
1974	10,910,000	1974	2,529,207,000
1975	11,444,643	1975	2,808,506,000
1976	11,674,000	1976	3,197,059,000
1977	12,421,000	1977	3,328,360,000
1978	12,975,000	1978	3,572,951,000
1979	13,225,000	1979	4,192,613,000
1980	13,717,152	1980	4,787,964,000
1981	13,851,482	1981	5,276,000,000
1982	14,310,717	1982	5,208,500,000
1983	14,620,648	1983	5,547,987,000
1984	14,405,972	1984	6,100,000,000[1]
1985	14,213,300	1985	6,300,000,000[1]
		1986	6,867,000,000[1]

Source: Statistics Canada. [1]Automotive Jobber Sales figures for 1984, 1985 and 1986 were provided by the Automotive Industries Assn. of Canada.

What It Costs to Own, Operate Average Car in 1986

Figures Based on Composite Costs*
Cost Per Mile

Cost Item	1986
Gasoline (unleaded) and oil	4.30 cents
Tires	.68 cents
Maintenance	1.34 cents

Fixed Costs Per Year

Comprehensive insurance ($100 ded.)	$ 79.00
$250 deductible collision insurance	$ 182.00
Property damage and liability ($100/300/50M)	$ 232.00
License, registration, taxes	$ 121.00
Depreciation	$1,341.00
Finance charge (20% down, 13.5% for 4 years)	$ 574.00
TOTAL COST PER MILE	23.2 cents
TOTAL COST PER YEAR	$3,477.00

Source: American Automobile Association. The AAA study used cars that were equipped with standard and optional accessories, automatic transmission, power steering, power disc brakes, AM/FM stereo, cruise control and rear window defogger. Gasoline costs were based on a $.971 per-gallon charge for unleaded fuel. The study based insurance figures on personal, rather than business use of a vehicle. The cars were driven less than 10 miles to work. There were no youthful drivers. Depreciation costs were based on trade-in value at the end of four years or at 60,000 miles. *The costs for operating a Chevrolet Chevette, Celebrity and Caprice were averaged to arrive at these figures.

U.S. Battery Shipments by Year

Year	Replacement	Original Equipment	Total Number
1976	49,202,906	12,551,090	61,753,996
1977	54,600,707	14,717,697	69,318,404
1978	56,389,494	15,192,304	71,581,798
1979	53,746,314	14,389,748	68,136,062
1980	50,063,224	10,018,409	60,081,633
1981	53,597,906	10,005,102	63,603,008
1982	54,200,000	8,400,000	62,600,000
1983	56,104,752	10,822,900	66,927,652
1984	59,332,509	12,765,218	72,097,727
1985	58,683,589	13,466,528	72,150,117
1986	60,306,004	13,272,013	73,578,017

Source: Battery Council International.

Shipments Of Passenger Car Tires

Year	Original Equipment	Replacement	Export	Total
1976	49,905,133	122,999,524	4,104,659	177,009,316
1977	55,667,960	129,283,293	4,600,816	189,552,114
1978	54,962,674	135,151,410	3,752,806	193,866,890
1979	48,188,000	121,922,000	3,909,000	174,019,000
1980	34,932,806	106,912,217	4,074,250	145,919,273
1981[1]	35,979,000	125,263,000	4,017,000	165,259,000
1982	33,981,000	130,539,000	2,949,000	167,469,000
1983	43,845,000	133,964,000	4,206,000	182,015,000
1984	50,993,000	144,580,000	6,064,000	201,637,000
1985	54,838,000	141,455,000	4,625,000	200,918,000
1986	54,392,000	144,267,000	4,032,000	202,691,000

Source: *Rubber Manufacturers Association.* [1]Figures have been adjusted to include those manufacturers, both foreign and domestic, that do not report to RMA. 1982 and subsequent totals include Volkswagen. 1983 and subsequent totals includes Renault.

Productivity of People Working For ASIA Heavy Duty Distributors

	Median Distributor (1985)
Non-Shop Employees	
Parts & Merchandise Sales Per Non-Shop Employee	$169,120
Parts & Merchandise Gross Profit Per Non-Shop Employee	$ 56,240
Operating Expense Per Non-Shop Employee	$ 50,900
Personnel Productivity Index: Gross Profit to Payroll	2.21 to 1[1]
Parts & Merchandise Sales Per Outside Salesman	$788,230
Parts & Merchandise Gross Profit Per Outside Salesman	$258,470
Shop Personnel	
Machine Shop Sales Per Machine Shop Employee	$ 31,410
Machine Shop Gross Profit Per Machine Shop Employee	$ 13,230

Source: 1986 Edition of *Management Performance Measurement for ASIA Heavy Duty Distributors,* published by the Automotive Service Industry Association. [1]Ratios relate dollars to dollars. In the Personnel Productivity Index, for example, there was $2.21 of gross profit for every $1.00 of payroll.

Latest Financial Rankings of

Automobile Parts—Miscellaneous

Figures Apply to 1985 With Certain Exceptions, As Noted

RANK	COMPANY	REVENUES ($ MILL.) '85 AMT
1	Federal-Mogul Corp.	895.50
2	Echlin, Inc.	771.40
3	Sealed Power Corp.	624.50
4	Intermark, Inc.	517.20
5	Bearings, Inc.	490.20
6	Standard Products Co.	433.20
7	Allen Group, Inc.	399.20
8	Modine Manufacturing Co.	312.00
9	Douglas & Lomason Co.	266.60
10	Standard Motor Products	242.80
11	Wynn's International, Inc.	236.50
12	Haynes-Albion Corp.	226.50
13	Facet Enterprises, Inc.	164.90
14	LSB Industries, Inc.	149.40
15	Trico Products Corp.	145.90
16	Kysor Industrial Corp.	141.80
17	Simpson Industries, Inc.	138.80[1]
18	Sparton Corp.	137.70[1]
19	Lamson & Sessions Co.	132.30
20	Superior Industries	130.80
21	Twin Disc, Inc.	121.20
22	Raymark Corp.	112.40
23	Republic Automotive	112.30
24	Champion Parts	100.90
25	Arrow Automotive	97.10[1]
26	Cascade Corp.	86.70
27	Hastings Manufacturing	62.60
28	Redlaw Industries, Inc.	53.00
29	Howell Industries, Inc.	38.50
30	Metex Corp.	29.40
31	Valley Forge Corp.	26.90

RANK	COMPANY	NET INCOME ($ MILL.) '85 AMT
1	Federal-Mogul Corp.	52.00
2	Echlin, Inc.	45.60
3	Sealed Power Corp.	29.90
4	Standard Products Co.	27.20
5	Modine Manufacturing Co.	20.50
6	Allen Group, Inc.	16.70
7	Kysor Industrial Corp.	10.70
8	Standard Motor Products	10.50
9	Howell Industries, Inc.	7.50
10	Simpson Industries, Inc.	7.40[1]
11	Superior Industries	7.20
12	Douglas & Lomason Co.	6.70
13	Hayes-Albion Corp.	5.90
14	Cascade Corp.	5.60
15	Redlaw Industries, Inc.	3.90
16	Bearings, Inc.	2.20
17	Metex Corp.	2.00
18	Arrow Automotive	1.60[1]
19	Hastings Manufacturing	1.50
19	Lamson & Sessions Co.	1.50
21	Valley Forge Corp.	0.90
22	Facet Enterprises, Inc.	0.70
23	Champion Parts	d0.90
24	Wynn's International, Inc.	d2.00
25	Republic Automotive	d2.30
26	Intermark, Inc.	d3.60
27	Twin Disc, Inc.	d3.70
28	Sparton Corp.	d4.40[1]
29	Trico Products Corp.	d6.00
30	LSB Industries, Inc.	d16.60
31	Raymark Corp.	d18.20

Automobile Parts—Major

RANK	COMPANY	REVENUES ($ MILL.) '85 AMT
1	Dana Corp.	3,695.00[2]
2	Eaton Corp.	3,674.50
3	Genuine Parts Co.	2,279.50
4	Cummins Engine Co., Inc.	2,146.30
5	Trinova Corp.	1,922.00
6	Timken Co.	1,090.70
7	Smith (A.O.) Corp.	910.90[2]
8	Champion Spark Plug Co.	829.40
9	Arvin Industries, Inc.	821.00
10	Barnes Group, Inc.	431.80
11	Acklands Ltd.	273.20
12	Cardis Corp.	130.40
13	Mr. Gasket Co.	126.40
14	Walbro Corp.	73.00

RANK	COMPANY	NET INCOME ($ MILL.) '85 AMT
1	Eaton Corp.	230.90
2	Genuine Parts Co.	120.40
3	Dana Corp.	85.90[2]
4	Trinova Corp.	74.60
5	Cummins Engine Co., Inc.	50.40
6	Arvin Industries, Inc.	35.90
7	Smith (A.O.) Corp.	26.10[2]
8	Barnes Group, Inc.	16.40
9	Champion Spark Plug Co.	15.20
10	Acklands Ltd.	6.10
11	Mr. Gasket Co.	5.30
12	Walbro Corp.	4.90
13	Cardis Corp.	1.30
14	Timken Co.	d3.90

Publicly-Owned Automotive Firms

Automobile Parts—Miscellaneous

Figures Apply to 1985 With Certain Exceptions, As Noted

OPERATING PROFIT MARGIN (%)

RANK	COMPANY	'85 AMT
1	Kysor Industrial Corp.	13.10
2	Modine Manufacturing Co.	12.90
3	Cascade Corp.	11.40
3	Federal-Mogul Corp.	11.40
5	Echlin, Inc.	10.80
6	Sealed Power Corp.	10.30
7	Standard Products Co.	10.00[1]
8	Howell Industries, Inc.	8.90
9	Superior Industries	8.70
10	Metex Corp.	8.50
11	Simpson Industries, Inc.	8.00[1]
12	Standard Motor Products	7.40[1]
13	Twin Disc, Inc.	7.20[1]
14	Allen Group, Inc.	7.00
15	Valley Forge Corp.	6.60
16	Intermark, Inc.	5.60
17	Hastings Manufacturing	5.50
18	Douglas & Lomason Co.	5.20[1]
19	Bearings, Inc.	5.00[1]
20	Champion Parts	4.60
21	Hayes-Albion Corp.	4.40
22	Redlaw Industries, Inc.	3.70
23	Arrow Automotive	3.50[1]
24	Lamson & Sessions Co.	3.20
25	Republic Automotive	0.90
26	Trico Products Corp.	0.50
27	Facet Enterprises, Inc.	..
27	LSB Industries, Inc.	..
27	Raymark Corp.	..
27	Sparton Corp.	..
27	Wynn's International, Inc.	..
	Average	5.90

RETURN ON CAPITAL (%)

RANK	COMPANY	'85 AMT
1	Howell Industries, Inc.	43.19
2	Standard Products Co.	18.14[1]
3	Kysor Industrial Corp.	15.60
4	Superior Industries	14.21
5	Modine Manufacturing Co.	12.49
6	Simpson Industries, Inc.	12.30[1]
7	Cascade Corp.	10.96
8	Redlaw Industries, Inc.	10.87
9	Echlin, Inc.	10.69
10	Douglas & Lomason Co.	10.34
11	Federal-Mogul Corp.	10.21
12	Metex Corp.	9.07
13	Hayer-Albion Corp.	8.96
14	Allen Group, Inc.	8.53
15	Standard Motor Products	7.56
16	Twin Disc, Inc.	7.29[1]
17	Sealed Power Corp.	6.96
18	Bearings, Inc.	6.00[1]
19	Valley Forge Corp.	5.70
20	Hastings Manufacturing	5.51
21	Lamson & Sessions Co.	4.84
22	Arrow Automotive	3.17[1]
23	Champion Parts	..
23	Facet Enterprises, Inc.	..
23	Intermark, Inc.	..
23	LSB Industries, Inc.	..
23	Raymark Corp.	..
23	Republic Automotive	..
23	Sparton Corp.	..
23	Trico Products Corp.	..
23	Wynn's International, Inc.	..
	Average	7.80

Automobile Parts—Major

OPERATING PROFIT MARGIN (%)

RANK	COMPANY	'85 AMT
1	Mr. Gasket Co.	13.50[1]
2	Walbro Corp.	11.00
3	Genuine Parts Co.	10.40
4	Dana Corp.	10.00
5	Eaton Corp.	9.90
6	Barnes Group, Inc.	9.40
7	Trinova Corp.	8.60
8	Arvin Industries, Inc.	8.30
9	Smith (A.O.) Corp.	5.90
10	Champion Spark Plug Co.	5.80
11	Cardis Corp.	5.60
12	Cummins Engine Co., Inc.	5.20
13	Acklands Ltd.	4.30
14	Timken Co.	..
	Average	7.70

RETURN ON CAPITAL (%)

RANK	COMPANY	'85 AMT
1	Genuine Parts Co.	15.62
2	Walbro Corp.	12.19
3	Arvin Industries, Inc.	11.18
4	Barnes Group, Inc.	10.34
5	Eaton Corp.	10.30
6	Dana Corp.	9.55
7	Smith (A.O.) Corp.	8.78
8	Trinova Corp.	7.69
9	Acklands Ltd.	5.43
10	Mr. Gasket Co.	4.74[1]
11	Cummins Engine Co., Inc.	4.26
12	Champion Spark Plug Co.	3.60
13	Cardis Corp.	1.79
14	Timken Co.	..
	Average	7.50

Source: Moody's Industry Review, published by Moody's Investors Service. [1]1984. [2]Fiscal year ends 6-30.

U.S. Car Production:

	1986 Calendar Year	Pct. of Output	1985 Calendar Year	Pct. of Output	Pct. of Change '86 vs. '85
AMERICAN MOTORS	49,435	0.63	111,138	1.36	- 0.73
Renault Total	49,435	0.63	111,138	1.36	- 0.73
Alliance	46,088	0.59	74,292	0.91	- 0.32
Encore	3,347	0.04	36,846	0.45	- 0.41
CHRYSLER MOTORS	1,287,659	16.45	1,266,068	15.47	+ 0.98
Plymouth Total	422,618	5.40	369,487	4.51	+ 0.88
Horizon	171,882	2.20	142,611	1.74	+ 0.45
Sundance	36,855	0.47	0	0.00	+ 0.47
Reliant	151,695	1.94	162,690	1.99	- 0.05
Caravelle	44,368	0.57	49,006	0.60	- 0.03
Gran Fury	17,818	0.23	15,180	0.19	+ 0.04
Chrysler Total	368,637	4.71	414,193	5.06	- 0.35
Laser	25,327	0.32	52,209	0.64	- 0.31
LeBaron	83,163	1.06	96,339	1.18	- 0.11
LeBaron J Coupe	4,043	0.05	0	0.00	+ 0.05
LeBaron GTS	68,699	0.88	95,187	1.16	- 0.29
N.Y./E-Class	64,964	0.83	64,342	0.79	+ 0.04
Fifth Avenue	122,441	1.56	106,116	1.30	+ 0.27
Dodge Total	496,404	6.34	482,388	5.89	+ 0.45
Daytona	33,097	0.42	47,746	0.58	- 0.16
Omni	163,416	2.09	136,823	1.67	+ 0.42
Shadow	35,107	0.45	0	0.00	+ 0.45
Aries	126,311	1.61	135,186	1.65	- 0.04
Dodge 600	64,063	0.82	66,835	0.82	0.00
Lancer	47,817	0.61	65,097	0.80	- 0.18
Diplomat	26,593	0.34	30,701	0.38	- 0.04
FORD MOTOR	1,764,316	22.53	1,636,150	19.99	+ 2.55
Ford Division	1,221,956	15.61	1,098,647	13.42	+ 2.19
Escort	378,359	4.83	344,589	4.21	+ 0.62
EXP	0	0.00	3,842	0.05	- 0.05
Mustang	177,737	2.27	187,776	2.29	- 0.02
Tempo	198,808	2.54	188,124	2.30	+ 0.24
LTD	0	0.00	184,431	2.25	- 2.25
Taurus	335,669	4.29	12,250	0.15	+ 4.14
Thunderbird	131,383	1.68	170,513	2.08	- 0.40
Crown Victoria	0	0.00	7,122	0.09	- 0.09
L-M Division	542,360	6.93	537,503	6.57	+ 0.36
Mercury Total	359,325	4.59	374,426	4.57	+ 0.02
Lynx	60,246	0.77	75,078	0.92	- 0.15
Capri	12,344	0.16	20,095	0.25	- 0.09
Topaz	57,576	0.74	54,060	0.66	+ 0.07
Cougar	101,829	1.30	129,788	1.59	- 0.28
Marquis	0	0.00	84,862	1.04	- 1.04
Sable	127,330	1.63	5,810	0.07	+ 1.56
Grand Marquis	0	0.00	4,733	0.06	- 0.06
Lincoln Total	183,035	2.34	163,077	1.99	+ 0.35
Continental	19,628	0.25	25,259	0.31	- 0.06
Lincoln	137,286	1.75	119,787	1.46	+ 0.29
Mark VII	26,121	0.33	18,031	0.22	+ 0.11
GENERAL MOTORS	4,124,730	52.68	4,822,478	58.89	- 6.23
Buick Total	775,966	9,91	1,001,461	12.23	- 2.32
Skyhawk	82,429	1.05	105,617	1.29	- 0.24
Century	230,137	2.94	299,104	3.65	- 0.71
Regal	60,897	0.78	137,018	1.67	- 0.90

1986 Compared to 1985

	1986 Calendar Year	Pct. of Output	1985 Calendar Year	Pct. of Output	Pct. of Change '86 vs. '85
Skylark (X-Car)	0	0.00	40,953	0.50	−0.50
Somerset/Skylark	112,773	1.44	125,593	1.53	−0.09
LeSabre (fwd)	156,869	2.00	9,960	0.12	+1.88
LeSabre/Electra	15,192	0.19	96,652	1.18	−0.99
Electra	91,559	1.17	138,682	1.69	−0.52
Riveria	26,110	0.33	47,882	0.58	−0.25
Cadillac Total	319,096	4.08	322,765	3.94	+0.13
Cimarron	23,247	0.30	26,703	0.33	−0.03
Allante	53	0.00	0	0.00	0.00
Brougham (rwd)	76,469	0.98	39,773	0.49	+0.49
DeVille (fwd)	171,607	2.19	174,310	2.13	+0.06
Eldorado	25,246	0.32	53,301	0.65	−0.33
Seville	22,474	0.29	28,678	0.35	−0.06
Chevrolet Total	1,310,710	16.74	1,627,767	19.88	−3.14
Chevette	105,488	1.35	153,883	1.88	−0.53
Camaro	172,585	2.20	214,429	2.62	−0.42
Cavalier	395,154	5.05	492,004	6.01	−0.96
Celebrity	257,983	3.29	264,097	3.23	+0.07
Citation	0	0.00	28,697	0.35	−0.35
Corsica/Beretta	17,200	0.22	0	0.00	+0.22
Monte Carlo	110,048	1.41	138,532	1.69	−0.29
Chevrolet	223,942	2.86	289,821	3.54	−0.68
Corvette	28,410	0.36	46,304	0.57	−0.20
Oldsmobile Total	927,173	11.84	1,168,982	14.28	−2.44
Firenza	38,212	0.49	62,152	0.76	−0.27
Calais	120,629	1.54	149,829	1.83	−0.29
Cutlass Ciera	236,613	3.02	356,798	4.36	−1.34
Cutlass Supreme	107,036	1.37	235,496	2.88	−1.51
88 (fwd)	272,318	3.48	23,460	0.29	+3.19
88 (rwd)	19,028	0.24	168,940	2.06	−1.82
Olds 98	114,558	1.46	143,277	1.75	−0.29
Toronado	18,779	0.24	29,030	0.35	−0.11
Pontiac Total	791,785	10.11	701,503	8.57	+1.54
Acadian[1]	16,539	0.21	16,602	0.20	+0.01
Fiero	69,735	0.89	109,569	1.34	−0.45
1000	16,814	0.21	24,895	0.30	−0.09
Firebird	105,109	1.34	114,290	1.40	−0.05
2000 Sunbird	130,167	1.66	142,947	1.75	−0.08
Grand Am	231,318	2.95	143,259	1.75	+1.20
6000	132,385	1.69	58,952	0.72	+0.97
Bonneville	39,886	0.51	0	0.00	+0.51
Parisienne	49,832	0.64	90,989	1.11	−0.48
HONDA	248,159	3.17	145,337	1.78	+1.39
Civic	34,348	0.44	0	0.00	+0.44
Accord	213,811	2.73	145,337	1.78	+0.96
NISSAN	65,147	0.83	43,810	0.54	+0.30
NUMMI	205,854	2.63	64,601	0.79	+1.84
Corolla	14,318	0.18	0	0.00	+0.18
Nova	191,536	2.45	64,601	0.79	+1.66
VOLKSWAGEN	84,397	1.08	96,458	1.18	−0.10
Golf/GTI	83,247	1.06	96,458	1.18	−0.12
Jetta	1,150	0.01	0	0.00	+0.01
Total Cars U.S.	7,829,697	100.00	8,186,040	100.00	

Source: Reprinted by permission from Automotive News, Copyright 1987. [1]Built for sale in Canada only.

Scrappage of Motor Vehicles

(During One-Year Periods Ending June 30)

	Passenger Cars	Trucks	Cars & Trucks
July 1, 1946 - June 30, 1947	478,048	(36,328)	441,720
July 1, 1947 - June 30, 1948	855,517	307,660	1,163,177
July 1, 1948 - June 30, 1949	1,220,041	484,245	1,704,286
July 1, 1949 - June 30, 1950	2,313,813	517,054	2,830,867
July 1, 1950 - June 30, 1951	3,713,417	660,008	4,373,425
July 1, 1951 - June 30, 1952	3,137,989	531,835	3,669,824
July 1, 1952 - June 30, 1953	2,465,936	615,932	3,081,868
July 1, 1953 - June 30, 1954	3,491,000	780,513	4,271,513
July 1, 1954 - June 30, 1955	3,247,436	467,659	3,715,095
July 1, 1955 - June 30, 1956	4,312,759	596,257	4,909,016
July 1, 1956 - June 30, 1957	4,309,153	630,303	4,939,456
July 1, 1957 - June 30, 1958	4,221,607	502,245	4,723,852
July 1, 1958 - June 30, 1959	2,981,641	372,085	3,353,726
July 1, 1959 - June 30, 1960	4,348,719	690,568	5,039,287
July 1, 1960 - June 30, 1961	4,294,118	646,791	4,940,909
July 1, 1961 - June 30, 1962	4,360,774	575,903	4,936,677
July 1, 1962 - June 30, 1963	4,741,017	720,039	5,461,056
July 1, 1963 - June 30, 1964	5,319,286	779,870	6,099,156
July 1, 1964 - June 30, 1965	5,704,373	735,975	6,440,348
July 1, 1965 - June 30, 1966	6,173,512	1,073,593	7,247,105
July 1, 1966 - June 30, 1967	6,984,214	946,649	7,930,863
July 1, 1967 - June 30, 1968	6,200,017	860,542	7,060,559
July 1, 1968 - June 30, 1969	6,348,488	966,003	7,314,491
July 1, 1969 - June 30, 1970	7,460,984	837,173	8,298,157
July 1, 1970 - June 30, 1971	6,021,041	1,043,877	7,064,918
July 1, 1971 - June 30, 1972	7,058,029	1,048,031	8,106,060
July 1, 1972 - June 30, 1973	7,987,384	1,207,536	9,194,920
July 1, 1973 - June 30, 1974	7,193,679	1,047,207	8,240,886
July 1, 1974 - June 30, 1975	5,668,708	907,699	6,576,407
July 1, 1975 - June 30, 1976	6,828,903	1,097,457	7,926,360
July 1, 1976 - June 30, 1977	8,233,925	1,667,653	9,901,578
July 1, 1977 - June 30, 1978	7,907,075	1,426,294	9,333,369
July 1, 1978 - June 30, 1979	9,312,274	1,916,142	11,228,416
July 1, 1979 - June 30, 1980	8,404,993	1,731,670	10,136,663
July 1, 1980 - June 30, 1981	7,542,480	1,518,546	9,061,026
July 1, 1981 - June 30, 1982	6,921,273	1,458,795	8,380,068
July 1, 1982 - June 30, 1983	6,242,544	1,490,971	7,733,515
July 1, 1983 - June 30, 1984	6,674,928	1,601,889	8,276,817
July 1, 1984 - June 30, 1985	7,728,594	2,100,120	9,828,714
July 1, 1985 - June 30, 1986	8,442,465	2,311,090	10,753,555

Source: R. L. Polk & Co., Motor Statistical Division. Note: Adjustments for the absence of Oklahoma and other states have been made where applicable.

Imported New-Car Sales in U.S. Since 1979

	1986	1985	1984	1983	1982	1981	1980	1979
Acura	52,869	—	—	—	—	—	—	—
Alfa Romeo	8,201	4,502	3,702	3,002	2,194	2,301	3,000	4,011
Audi	59,797	74,061	71,237	47,936	45,954	50,817	42,483	42,709
Aston Martin	74	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Bertone	1,482	N.A.	N.A.	—	—	—	—	—
BMW	96,759	87,832	70,897	59,242	52,393	41,761	37,071	34,521
Capri	—	—	—	—	—	—	—	—
Chevrolet Spectrum	99,380	53,968	2,077	—	—	—	—	—
Chevrolet Sprint	60,983	30,892	10,927	—	—	—	—	—
Chrysler Conquest	2,572	—	—	—	—	—	—	—
DeLorean	—	—	—	—	2,830	3,009	—	—
Dodge Colt	48,249	39,724	36,560	39,158	75,031	42,796	50,689	62,705
Dodge Conquest	2,335	2,716	3,725	14,024	14,128	12,690	12,924	14,166
Dodge Vista	18,101	12,023	7,805	2,311	—	—	—	—
Fiat	—	—	—	6,184	14,113	32,185	37,814	58,934
Ferrari	771	N.A.	N.A.	N.A.	N.A.	N.A.	779	679
Fiesta	—	—	—	—	—	32,856	68,595	78,109
Honda	405,399	406,413	374,819	350,670	365,865	370,705	375,388	353,291
Hyundai	168,882	—	—	—	—	—	—	—
Isuzu	38,910	26,953	17,233	20,731	15,462	17,805	—	—
Jaguar	24,464	20,528	18,044	15,815	10,349	4,695	3,029	3,746
Lamborghini	107	26	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Lancia	—	—	—	637	1,174	1,068	2,100	1,602
Maserati	1,298	1,190	2,023	—	—	—	—	—
Mazda	222,716	211,093	169,666	173,388	163,150	166,105	161,623	156,533
Mercedes-Benz	99,314	89,098	79,222	73,692	65,963	63,059	53,790	52,819
Merkur	14,315	8,975	—	—	—	—	—	—
MG	—	—	—	—	3,712	13,370	26,025	26,656
Mitsubishi	49,436	49,734	39,104	32,755	3,950	—	—	—
Nissan	493,549	535,372	485,209	521,902	470,246	464,805	516,890	472,252
Opel	—	—	—	—	—	—	—	13,815
Peugeot	14,296	15,636	20,007	15,241	14,323	16,937	12,930	11,688
Plymouth Colt	45,094	36,491	32,819	34,513	—	42,128	55,474	48,680
Plymouth Conquest	2,182	2,671	3,344	11,571	13,068	13,326	10,263	12,322
Plymouth Vista	16,995	11,588	7,465	1,992	—	—	—	—
Porsche	30,471	25,306	20,024	21,831	14,407	11,241	10,490	13,818
Renault	4,152	7,205	12,243	33,229	37,540	30,869	25,365	18,862
Rolls-Royce	1,155	1,110	1,083	1,046	N.A.	1,158	942	1,002
Rover	—	—	—	—	—	—	481	—
Saab	48,181	39,068	33,631	26,323	18,463	14,613	13,558	15,142
Subaru	183,242	178,175	157,385	156,840	150,335	152,062	142,968	127,871
Toyota	640,155	620,047	557,981	555,766	530,246	576,491	582,204	507,816
Triumph	—	—	—	—	—	9,768	14,939	12,733
Volkswagen	143,318	140,505	103,479	77,009	67,352	82,173	90,923	125,100
Volvo	113,267	104,267	99,541	88,857	72,352	64,477	56,999	56,027
Yugo	35,959	3,895	—	—	—	—	—	—
Total	3,248,430	2,841,063	2,441,341	2,386,064	2,220,911	2,326,376	2,396,934	2,327,932

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Annual Factory Sales of Motor Vehicles From U.S. Plants

	Passenger Cars	Motor Trucks and Buses	Total Vehicles
1986	7,516,189	3,392,885	10,909,074
1985	8,002,259	3,356,905	11,359,164
1984	7,621,176	3,075,325	10,696,501
1983	6,739,223	2,413,897	9,153,120
1982	5,049,184	1,906,455	6,955,639
1981	6,255,340	1,700,908	7,956,248
1980	6,400,026	1,667,283	8,067,309
1979	8,419,226	3,036,706	11,455,932
1978	9,165,190	3,706,239	12,871,429
1977	9,200,849	3,441,521	12,642,370
1976	8,500,305	2,979,476	11,479,781
1975	6,712,852	2,272,160	8,985,012
1974	7,331,256	2,727,313	10,058,569
1973	9,657,647	2,979,688	12,637,335
1972	8,823,938	2,446,807	11,270,745
1971	8,584,592	2,053,146	10,637,738
1970	6,546,817	1,692,440	8,239,257
1969	8,223,715	1,923,179	10,146,894
1968	8,822,158	1,896,078	10,718,236
1967	7,436,764	1,539,462	8,976,226
1966	8,598,326	1,731,084	10,329,410
1965	9,305,561	1,751,805	11,057,366
1964	7,751,822	1,540,453	9,292,275
1963	7,637,728	1,462,708	9,100,436
1962	6,933,240	1,240,168	8,173,408
1961	5,542,707	1,133,804	6,676,511
1960	6,674,796	1,194,475	7,869,271
1959	5,591,243	1,137,386	6,728,629
1955	7,920,186	1,249,106	9,169,292
1950	6,665,863	1,337,193	8,003,056
1945	69,532	655,683	725,215
1940	3,717,385	754,901	4,472,286
1935	3,273,874	697,367	3,971,241
1930	2,787,456	575,364	3,362,820
1925	3,735,171	530,659	4,265,830
1920	1,905,560	321,789	2,227,349
1915	895,930	74,000	969,930
1910	181,000	6,000	187,000
1905	24,250	750	25,000
1900	4,192	—	4,192

Source: Motor Vehicle Manufacturers Assn. of the U.S., Inc., and Ward's Automotive Reports.

United States Car Production By Model Year, 1959 to 1986

1986	7,890,392
1985	7,975,390
1984	8,102,269
1983	5,768,893
1982	5,447,135
1981	6,639,954
1980	7,085,480
1979	9,526,024
1978	8,995,418
1977	9,159,100
1976	8,114,376
1975	6,523,880
1974	8,125,488
1973	9,915,802
1972	8,589,049
1971	7,221,290
1970	7,595,411
1969	8,440,765
1968	8,402,870
1967	7,666,898
1966	8,606,166
1965	7,882,679
1964	7,892,090
1963	7,339,992
1962	6,686,749
1961	5,407,255
1960	6,011,482
1959	5,566,527

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United States Car Production By Calendar Year, 1959 to 1986

1986	7,829,697
1985	8,186,040
1984	7,777,721
1983	7,112,352
1982	4,973,870
1981	6,280,045
1980	6,416,885
1979	8,418,369
1978	9,153,299
1977	9,293,674
1976	8,537,759
1975	6,740,584
1974	7,309,763
1973	9,667,118
1972	8,827,706
1971	8,557,878
1970	6,550,077
1969	8,224,267
1968	8,848,507
1967	7,412,610
1966	8,604,726
1965	9,335,208
1964	7,744,888
1963	7,644,359
1962	6,943,470
1961	5,522,004
1960	6,703,086
1959	5,599,471

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U.S. Car Output by Calendar Year

(By Size Classification)

1986 Position	1986 Total	Make	1985 Total	1985 Position
		SUBCOMPACT		
1	378,359	Escort	344,589	1
2	213,811	Accord	145,337	3
3	191,536	Nova	64,601	10
4	171,882	Horizon	142,611	4
5	163,416	Omni	136,832	5
6	105,488	Chevette	153,883	2
7	83,247	Golf/GTI	96,458	7
8	69,735	Fiero	109,569	6
9	65,147	Sentra	43,810	13
10	60,246	Lynx	75,078	8
11	46,088	Alliance	74,292	9
12	33,097	Daytona	47,746	12
13	25,327	Laser	52,209	11
14	24,348	Civic	—	
15	16,814	Pontiac 1000	24,895	15
16	16,539	Acadian[1]	16,602	16
17	14,318	Corolla FX-16	—	
18	3,347	Encore	36,846	14
	—	EXP	3,842	17
	1,682,745	Total	1,569,191	
		COMPACT		
1	395,154	Cavalier	492,004	1
2	198,808	Tempo	188,124	3
3	177,737	Mustang	187,776	4
4	172,585	Camaro	214,429	2
5	151,695	Reliant	162,690	5
6	130,167	2000 Sunbird	142,947	6
7	126,311	Aries	135,186	7
8	105,109	Firebird	114,290	8
9	83,163	LeBaron K	96,339	10
10	82,429	Skyhawk	105,617	9
11	57,576	Topaz	54,060	12
12	38,212	Firenza	62,152	11
13	36,855	Sundance	—	
14	35,107	Shadow	—	
15	23,247	Cimarron	26,703	13
16	12,344	Capri	20,095	14
17	1,150	Jetta	—	
	1,827,649	Total	2,002,412	
		INTERMEDIATE		
1	335,669	Taurus	12,250	22
2	257,983	Celebrity	264,097	3
3	236,613	Cutlass Ciera	356,798	1
4	231,318	Grand Am	143,259	8
5	230,137	Century	299,104	2
6	132,385	6000	90,989	14
7	131,383	Thunderbird	170,513	6
8	127,330	Sable	5,810	23
9	120,629	Calais	149,829	7
10	112,773	Somerset	125,593	12
11	110,048	Monte Carlo	138,532	9
12	107,036	Cutlass Supreme	235,496	4
13	101,829	Cougar	129,788	11
14	68,699	LeBaron GTS	95,187	13
15	64,964	New Yorker	64,342	18
16	64,063	Dodge 600	66,835	16
17	60,897	Regal	137,018	10
18	47,817	Lancer	65,097	17

INTERMEDIATES (CONT.)

1986 Position	1986 Total	Make	1985 Total	1985 Position
19	44,368	Caravelle	49,006	19
20	17,200	Corsica/Beretta	—	
21	4,043	LeBaron J	—	
	—	LTD	184,431	5
	—	Citation	28,697	21
	—	Marquis	84,862	15
	—	Skylark	40,953	20
	2,607,184	Total	2,938,486	
		STANDARD		
1	272,318	Olds 88 (fwd)	23,460	6
2	223,842	Chevrolet	289,821	1
3	156,869	LeSabre (fwd)	9,960	8
4	49,832	Parisienne	58,952	4
5	39,886	Bonneville	—	
6	36,593	Diplomat	30,701	5
7	19,028	Olds 88 (rwd)	168,940	2
8	17,818	Gran Fury	15,180	7
9	15,192	LeSabre (rwd)	96,652	3
	—	Crown Victoria	7,122	9
	—	Grand Marquis	4,733	10
	831,378	Total	705,521	
		LUXURY		
1	171,607	DeVille	174,310	1
2	137,286	Lincoln	119,787	4
3	122,441	Fifth Avenue	106,116	5
4	114,558	Olds 98	143,277	2
5	91,559	Electra	138,682	3
6	76,469	Cadillac (rwd)	39,773	9
7	28,410	Corvette	46,304	8
8	26,121	Mark VII	18,031	13
9	26,110	Riviera	47,882	7
10	25,246	Eldorado	53,301	6
11	22,474	Seville	28,678	11
12	19,628	Continental	25,259	12
13	18,779	Toronado	29,030	10
14	53	Allante	—	
	880,741	Total	970,430	
	7,829,697	Grand Total	8,186,040	

Source: Reprinted by permission from Automotive News. Copyright 1987. [1]Built for sale in Canada only.

Truck/Bus Production Milestones[1]

1915	100,000th
1918	500,000th
1920	1 millionth
1929	5 millionth
1938	10 millionth
1953	25 millionth
1971	50 millionth
1979	75 millionth

Source: Motor Vehicle Manufacturers Assn. of the U.S., Inc., and *Ward's Automotive Reports*. [1]Based upon U.S. total factory sales data.

U.S.-Car Retail Outlets

1947 to 1987

Date	No. of Retail Outlets	Pct. Gain or Loss from Previous Year
Jan. 1, 1947	45,580	
Jan. 1, 1948	46,092	+1.12
Jan. 1, 1949	49,173	+6.66
Jan. 1, 1950	46,821	-4.78
Jan. 1, 1951	47,543	+1.54
Jan. 1, 1952	46,014	-3.22
Jan. 1, 1953	45,191	-1.79
Jan. 1, 1954	41,910	-7.26
Jan. 1, 1955	40,374	-3.66
Jan. 1, 1956	41,018	+1.60
Jan. 1, 1957	36,982	-7.40
Jan. 1, 1958	37,188	-2.09
Jan. 1, 1959	35,077	-5.68
Jan. 1, 1960	33,658	-4.05
Jan. 1, 1961	32,482	-3.49
Jan. 1, 1962	31,331	-3.54
Jan. 1, 1963	30,853	-1.53
Jan. 1, 1964	30,827	-0.08
Jan. 1, 1965	30,691	-0.44
Jan. 1, 1966	30,278	-1.35
Jan. 1, 1967	28,422	-6.14
Jan. 1, 1968	27,784	-2.24
Jan. 1, 1969	27,486	-1.07
Jan. 1, 1970	27,071	-1.51
Jan. 1, 1971	26,126	-3.49
Jan. 1, 1972	25,621	-1.93
Jan. 1, 1973	25,441	-0.70
Jan. 1, 1974	25,349	-0.36
Jan. 1, 1975	24,980	-1.46
Jan. 1, 1976	24,453	-2.11
Jan. 1, 1977	24,268	-0.76
Jan. 1, 1978	24,147	-0.50
Jan. 1, 1979	24,051	-0.40
Jan. 1, 1980	23,379	-2.79
Jan. 1, 1981	21,772	-6.87
Jan. 1, 1982[1]	21,680	-0.41
Jan. 1, 1983[2]	20,799	-4.06
Jan. 1, 1984	20,841	+0.20
Jan. 1, 1985	20,902	+0.29
Jan. 1, 1986	20,673	-1.10
Jan. 1, 1987	20,405	-1.30

Source: Reprinted by permission from *Automotive News*. Copyright 1987. [1]Jan. 1, 1982 and subsequent totals include Volkswagen. [2]Jan. 1, 1983 and subsequent totals include Renault. Copyright 1987, Automotive News.

United States Motor Truck Registrations by State

State	Privately Owned[1] 1984	Privately Owned[1] 1985	Privately and Publicly Owned[2] 1984	Privately and Publicly Owned[2] 1985
Alabama	904,819	963,759	927,109	986,190
Alaska	130,454	123,815	138,439	131,541
Arizona	589,431	634,836	602,631	648,252
Arkansas	507,476	469,537	517,154	478,634
California	3,661,292	3,961,247	3,835,287	4,141,597
Colorado	720,185	715,414	741,140	736,642
Connecticut	130,573	131,192	148,875	150,065
Delaware	89,837	91,715	91,763	94,004
Florida	1,696,800	1,864,452	1,807,402	1,979,875
Georgia	1,529,937	1,175,195	1,556,530	1,206,299
Hawaii	74,560	73,627	78,889	77,825
Idaho	371,161	299,166	390,460	318,586
Illinois	1,482,095	1,577,909	1,508,236	1,602,478
Indiana	971,185	988,217	998,605	1,016,507
Iowa	670,237	728,500	691,294	749,021
Kansas	645,231	653,165	661,605	669,875
Kentucky	773,685	792,787	808,863	831,631
Louisiana	874,241	909,065	890,307	925,327
Maine	202,411	206,103	213,271	216,990
Maryland	497,183	527,113	513,717	544,096
Massachusetts	429,262	431,408	456,150	458,423
Michigan	1,212,865	1,284,577	1,275,569	1,347,957
Minnesota	647,956	716,384	674,801	742,734
Mississippi	371,704	392,078	374,782	408,430
Missouri	901,908	911,548	916,115	925,969
Montana	266,086	244,141	277,401	255,807
Nebraska	409,571	404,885	423,804	417,108
Nevada	196,616	184,333	208,108	196,025
New Hampshire	117,982	149,899	126,102	158,741
New Jersey	407,584	410,000	478,741	480,308
New Mexico	428,264	409,351	444,339	425,859
New York	991,485	1,055,186	1,048,049	1,108,618
North Carolina	1,110,592	1,126,779	1,153,868	1,171,537
North Dakota	266,889	263,817	274,857	271,945
Ohio	1,292,846	1,277,163	1,338,229	1,324,115
Oklahoma	978,444	964,295	1,010,682	997,242
Oregon	593,023	614,051	618,512	634,081
Pennsylvania	1,203,137	1,245,015	1,248,704	1,291,791
Rhode Island	77,906	84,691	82,528	89,583
South Carolina	472,160	506,846	488,959	525,079
South Dakota	224,975	233,277	235,467	244,196
Tennessee	700,419	761,025	734,791	796,906
Texas	3,542,075	3,658,087	3,702,644	3,827,880
Utah	329,851	346,845	340,785	358,016
Vermont	84,195	90,891	88,105	94,831
Virginia	559,404	572,481	583,628	597,700
Washington	966,040	1,000,247	999,114	1,031,478
West Virginia	373,897	321,880	408,284	358,198
Wisconsin	663,057	683,791	695,534	716,876
Wyoming	193,653	203,052	200,996	211,114
District of Columbia	11,045	10,028	15,874	15,060
TOTAL	36,547,684	37,444,865	38,047,099	38,989,042

Source: U.S. Department of Transportation, Federal Highway Administration, Table MV-1. [1]Excludes farm trucks registered in certain states and restricted to use in vicinity of owner's farm. There were 66,696 such trucks in the 1985 count. [2]Includes federal, state, county and municipal vehicles; excludes vehicles owned by military services. Note: Registrations shown here are not synonymous with vehicles in use since the latter implies a count of vehicles in operation on a specific date or an average for a period of time, while registrations are a count of transactions (with transfers eliminated) during a specified period.

12 Leading Motor Vehicle Producers Worldwide

	1985	1984	1983	1982	1981
General Motors	8,467,577	8,256,000	7,769,000	6,244,000	6,762,000
Ford Motor Co.	5,550,500	5,584,651	4,934,231	4,267,587	4,402,462
Toyota	3,540,646	3,429,249	3,182,614	3,155,784	3,254,942
Nissan	2,500,088	2,481,686	2,462,436	2,557,269	2,811,580
Volkswagen	2,389,000	2,148,000	2,060,992	2,039,869	2,196,000
Chrysler Corp.	1,926,113	1,887,473	1,338,972	1,006,245	1,082,500
Renault	1,674,549	2,362,300	2,780,816	1,992,985	1,527,000
Fiat	1,631,054	1,409,000	1,441,870	1,335,187	1,364,000
Peugeot-Citroen	1,626,000	1,634,000	1,737,012	1,616,393	1,585,000
Honda	1,363,491	1,304,833	1,087,775	1,020,698	1,045,000
Mazda	1,330,211	1,336,100	1,261,350	1,202,583	1,230,000
Mitsubishi	1,236,351	1,165,500	1,018,403	1,024,243	1,095,000

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Services Warehouse Distributors Provide for Their Jobbers

(Percent of Forum Survey Respondents)

	Program Group Members	Non-Members	All
Co-op advertising/promotion programs	92.1	46.2	58.3
(Wholesale)	73.7	34.0	44.4
(Retail)	63.2	21.7	32.6
Clinics	89.5	50.9	61.1
(For jobber dealer customers)	89.5	48.1	59.0
(For jobber DIY customers)	21.1	1.9	6.9
Computerized ordering	60.5	28.3	36.8
Delivery service	94.7	75.5	80.6
(Daily)	84.2	56.6	63.9
(Weekly)	10.5	20.8	18.1
(Other)	13.2	1.9	11.1
Display units, gondolas	73.7	28.3	40.3
Financial assistance	63.2	26.4	36.1
Inventory control assistance	79.0	52.8	59.7
Management assistance/counseling	76.3	34.0	45.1
Obsolescence protection	94.7	67.9	75.0
Point-of-sale materials	81.6	57.6	63.9
Private branding	84.2	20.8	37.5
Repair manuals	60.5	19.8	30.6
Signage, inside/outside	81.6	24.5	39.6
Store layout assistance	65.8	20.8	32.6
Training programs	71.1	34.0	43.8
(For jobber outside sales personnel)	44.7	19.8	26.4
(For jobber counter personnel)	63.2	30.2	38.9

Source: Forum Survey Report on WD Marketing Practices, published in August 1986 JOBBER TOPICS.

How Wholesalers Rank Shows And Meetings

Forum Survey Question: If you could have attended one show or meeting in the past year, which one would you have selected?

	Percent of Forum Survey Respondents			
	Small Firms[1]	Medium Firms[1]	Large Firms[1]	All Firms
Big "I" (IAAS)	6.5	14.6	28.9	20.8
State Assn. show, meetings	12.9	9.1	13.4	12.0
PAS	0.0	5.4	5.1	4.4
AWDA	0.0	5.5	4.1	3.8
AERA	6.5	1.8	4.1	3.8
APAA	0.0	1.8	2.1	1.6
SEMA/Auto Internacional	3.2	3.6	0.0	1.6
Other	6.4	20.0	18.6	17.0
No Answer	64.5	38.2	23.7	35.0

Source: Forum Survey Report on Jobbers' Views of Shows and Meetings, published in January 1987 JOBBER TOPICS. [1]Small Firms are those with sales under $350,000; Medium Firms have sales from $350,000 to $750,000; Large Firms have sales over $750,000.

Certified Mechanics By Type of Employer

	Number of Certified Technicians	Percent of Total Certified
Domestic Dealerships	67,805	34.81
Import Dealerships	21,842	11.21
Service Stations	21,322	10.95
Independent Garages	22,386	11.49
Specialty Shops	6,900	3.52
Tire Dealers	14,645	7.52
Volume Retailers	3,149	1.62
Fleets (private)	7,735	3.97
Other	28,976	14.88
TOTAL	194,760	100.%

Source: The National Institute for Automotive Service Excellence. Figures represent technicians currently certified through fall of 1986 testing.

U.S. Trade in Motor Vehicle Parts And Accessories: 1982-86

(In Thousands of Dollars)

	1982	1983	1984	1985	1986
Total Exports	$10,641,745	$11,045,080	$13,836,159	$14,270,471	$13,039,040
Total Imports	9,112,226	12,597,206	16,980,573	18,947,124	21,200,940
Trade Balance	1,529,519	-1,552,118	-3,144,414	-4,676,653	-8,161,900
U.S.-Japan Trade Balance					
Exports to Japan	127,847	148,386	179,205	191,000	203,400
Imports from Japan	1,822,344	2,112,954	2,939,927	3,000,000	3,838,500
Trade Balance	-1,694,497	-1,964,586	-2,769,722	-2,796,600	-3,635,100

Source: U.S. International Trade Commission.

Trailer, Truck Tractor and Light Truck Registration

Private and Commercial Trailers[1]

State	Commercial Trailers[2]	Light Farm & Car Trailers	House Trailers[3]	Total Trailers	Truck Tractors[4]	Light Trucks[5]
Alabama	45,876	31,252	47,169	124,297	33,291	861,217
Alaska	11,197	31,099	5,257	47,553	2,266	115,048
Arizona	43,973	124,083	64,200	232,256	7,719	606,937
Arkansas	37,116	212,640	14,213	263,969	14,709	416,809
California	491,135	658,024	407,214	1,556,373	68,522	3,130,985
Colorado	47,959	144,332	59,860	252,151	7,926	632,956
Connecticut	22,566	120,255	—	142,821	2,972	115,642
Delaware	13,785	24,331	—	38,116	5,017	77,865
Florida	121,345	681,860	511,421	1,314,626	89,837	1,636,576
Georgia	79,516	279,408	19,720	378,644	38,616	1,058,413
Hawaii	3,229	13,877	—	17,106	982	68,412
Idaho	14,518	89,743	30,395	134,656	6,881	260,374
Illinois	82,232	352,222	89,503	523,957	51,908	1,304,137
Indiana	65,016	211,965	56,822	333,803	48,387	772,382
Iowa	41,730	232,725	46,545	321,000	35,900	551,900
Kansas	70,342	20,318	15,983	106,643	18,988	533,080
Kentucky	40,597	25,427	24,808	90,832	19,112	700,231
Louisiana	204,075	206,696	13,385	424,156	16,940	845,289
Maine	367,029	93,540	—	460,569	4,686	178,939
Maryland	15,186	151,544	—	166,730	12,494	462,265
Massachusetts	23,470	166,220	—	189,690	11,735	378,004
Michigan	80,207	569,099	91,315	740,621	48,054	1,069,897
Minnesota	97,057	412,818	72,764	582,639	17,783	560,838
Mississippi	26,569	55,815	8,236	90,620	14,020	337,969
Missouri	57,946	341,622	—	399,568	27,825	795,912
Montana	3,877	59,547	26,529	89,953	2,672	203,386
Nebraska	37,783	133,112	—	170,895	18,391	308,103
Nevada	4,029	53,969	22,077	80,075	2,105	174,610
New Hampshire	7,788	91,571	—	99,359	4,001	130,815
New Jersey	52,000	262,000	—	314,000	27,000	341,767
New Mexico	34,309	33,501	44,409	112,219	10,373	381,854
New York	35,061	417,736	—	452,797	26,764	917,218
North Carolina	72,383	247,069	8,459	327,911	47,309	976,695
North Dakota	16,295	31,902	96	48,293	7,931	186,358
Ohio	255,679	286,447	110,641	652,767	44,418	1,095,269
Oklahoma	73,543	59,040	20,375	152,958	38,337	836,479
Oregon	43,082	150,888	116,922	310,892	15,418	515,500
Pennsylvania	75,273	277,667	133,874	486,814	36,287	996,799
Rhode Island	6,115	26,952	—	33,067	1,839	74,105
South Carolina	28,136	26,305	129	54,570	11,546	465,439
South Dakota	20,999	65,511	20,476	106,986	7,521	203,827
Tennessee	38,021	32,362	90	70,473	30,417	693,870
Texas	204,684	1,153,330	—	1,358,014	131,208	3,337,245
Utah	11,490	49,268	35,242	96,000	9,610	314,270
Vermont	1,888	43,143	—	45,031	1,189	82,029
Virginia	60,438	123,815	52,940	237,193	26,663	500,474
Washington	142,091	281,554	86,378	510,023	12,870	882,882
West Virginia	17,966	33,253	26,528	77,747	3,309	297,449
Wisconsin	57,018	2,490	32,391	91,899	20,802	585,769
Wyoming	9,611	65,082	19,035	93,728	3,760	162,454
Dist. of Columbia	95	994	—	1,089	104	8,771
Total	3,413,325	9,259,423	2,335,401	15,008,149	1,150,414	32,145,514

Source: U.S. Department of Transportation, Federal Highway Administration. Tables MV-9 and MV-11. [1]The reporting of data on trailer registration varies greatly. Data are reported to the extent available. [2]Includes all commercial type trailers and semitrailers that are in private or for-hire use. [3]Mobile homes and house trailers are shown in this column for states which require them to be registered and are able to segregate them from other trailers. In states where this classification is not available, house trailers are included with light car trailers. [4]Data may include some large trucks used regularly in combination with full trailers. [5]Includes pickups, panels, and delivery vans generally of 10,000 pounds or less gross vehicle weight.

U.S. Van and Light Truck Output, '86 vs. '85

	Total '86 Output	% of '86 Output	Total '85 Output	% of '85 Output
CHEVROLET	1,179,376	37.98	1,325,491	39.74
Chevy Van/Sportvan	149,426	4.81	171,329	5.14
S-10	185,879	5.99	250,194	7.50
S-10 Blazer	140,733	4.53	231,605	6.95
Blazer	38,588	1.24	40,011	1.20
Astro	148,336	4.78	90,104	2.70
Suburban	64,204	2.07	64,670	1.94
Pickups	417,381	12.44	430,600	12.90
P Models	34,859	1.12	46,978	1.41
CHRYSLER	178,385	5.76	213,930	6.41
Ramcharger	26,130	0.84	19,766	0.59
Dakota	59,699	1.92	—	—
Pickups	92,556	3.00	194,164	5.82
FORD	1,105,890	35.62	1,148,279	34.44
Bronco	39,102	1.26	52,724	1.58
Bronco II	73,908	2.38	111,351	3.34
Econoline/Club Wagon	149,298	4.81	230,662	6.92
Pickups	540,126	17.40	439,512	13.18
Ranger	195,997	6.31	264,769	7.94
Aerostar	107,459	3.46	49,261	1.48
GMC	325,700	110.50	313,476	9.41
Vandura/Rally Vans	23,773	0.77	22,805	0.68
S-15	63,192	2.04	57,740	1.73
S-15 Jimmy	46,471	1.50	51,582	1.55
Jimmy	9,443	0.31	11,525	0.35
Safari	39,006	1.26	34,481	1.03
Suburban	25,883	0.83	23,850	0.72
Pickups	105,517	3.39	105,651	3.17
P Models	12,415	0.40	5,842	0.18
AMC-JEEP	207,514	6.68	225,914	6.78
Cherokee	107,225	3.47	120,328	3.61
CJ	18,414	0.59	46,553	1.40
Pickups	1,515	0.05	1,953	0.06
Wagoneer	12,800	0.41	10,021	0.30
Grand Wagoneer	17,254	0.56	17,814	0.53
Comanche	33,386	1.06	29,245	0.88
Scrambler	67	0.01	—	—
Wrangler	16,853	0.54	—	—
NISSAN	108,116	3.48	107,422	3.22
Pickups	108,116	3.48	107,422	3.22
TOTAL	3,104,981	100.00	2,334,512	100.00

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Car Production Milestones[1]

1912	1 millionth
1920	10 millionth
1935	50 millionth
1952	100 millionth
1960	150 millionth
1967	200 millionth
1972	250 millionth
1979	300 millionth
1986	350 millionth

Source: Motor Vehicle Manufacturers Assn. of the U.S., Inc., and *Ward's Automotive Reports*. [1]Based upon U.S. total factory sales data.

Profile of Establishments

State	Establishments Having Machine Shops	Paint/ Body Supplies	Heavy Duty Parts Supplies	Tires/ Accessories
Ala.	158	175	146	51
Alaska	5	16	19	6
Ariz.	110	81	88	32
Ark.	108	185	164	35
Calif.	827	420	600	170
Colo.	130	126	141	58
Conn.	113	117	104	40
Del.	24	31	26	7
D. of C.	2	4	3	1
Fla.	413	340	343	134
Ga.	193	261	234	56
Hawaii	21	39	25	13
Idaho	54	73	90	18
Ill.	525	502	358	152
Ind.	322	358	226	80
Iowa	204	315	229	79
Kan.	132	176	143	37
Ky.	154	218	137	53
La.	132	156	134	63
Maine	52	102	67	23
Md.	105	117	99	31
Mass.	204	230	177	61
Mich.	400	476	307	111
Minn.	181	276	160	60
Miss.	82	130	109	45
Mo.	265	306	227	91
Mont.	42	90	73	12
Neb.	110	141	98	30
Nev.	17	17	25	8
N.H.	39	75	47	15
N.J.	343	204	179	98
N.M.	48	52	65	18
N.Y.	519	538	424	187
N.C.	235	366	229	88
N.D.	50	68	57	16
Ohio	491	546	345	127
Okla.	142	134	118	48
Ore.	115	109	111	29
Pa.	465	644	392	186
R.I.	38	36	36	8
S.C.	131	172	119	35
S.D.	52	63	45	8
Tenn.	219	237	184	57
Texas	507	493	539	158
Utah	28	48	44	18
Vt.	26	52	31	10
Va.	136	219	180	80
Wash.	217	132	174	50
W. Va.	60	118	74	20
Wis.	246	281	165	59
Wyo.	27	50	41	10
TOTAL	9,221	10,108	8,154	2,884

Source: Jobber Topics Circulation Files. Note: The sum of column total exceeds Jobber Topics total circulation due to multiple mentions.

Influenced by JOBBER TOPICS

Hi-Performance Products	Ignition/ Electrical	Equipment/ Tools	Import Car Parts/ Supplies	Retail Sales	State
122	313	219	242	213	Ala.
4	32	27	25	24	Alaska
50	192	110	142	146	Ariz.
96	268	207	211	199	Ark.
424	1,279	867	1,174	1,069	Calif.
117	257	182	213	215	Colo.
75	220	157	179	197	Conn.
11	54	44	39	38	Del.
1	13	4	6	6	D. of C.
314	734	496	586	542	Fla.
211	445	331	256	303	Ga.
19	59	40	59	49	Hawaii
77	138	94	113	109	Idaho
278	862	621	591	673	Ill.
167	529	351	338	369	Ind.
139	447	304	272	337	Iowa
129	306	228	206	241	Kan.
84	294	211	206	187	Ky.
99	294	196	219	224	La.
32	125	92	97	92	Maine
72	241	175	181	162	Md.
93	416	292	320	306	Mass.
279	675	477	421	591	Mich.
113	322	257	225	245	Minn.
74	190	145	153	132	Miss.
205	532	394	387	400	Mo.
42	110	90	86	74	Mont.
68	204	150	115	152	Neb.
11	47	26	35	31	Nev.
24	96	73	77	80	N.H.
131	495	322	394	365	N.J.
40	100	68	80	85	N.M.
301	1,003	723	733	739	N.Y.
224	574	401	438	332	N.C.
25	93	74	58	72	N.D.
299	810	538	514	632	Ohio
119	286	207	190	216	Okla.
94	193	136	167	145	Ore.
246	930	650	648	674	Pa.
15	84	51	61	64	R.I.
121	277	198	224	194	S.C.
29	84	61	56	56	S.D.
145	373	245	286	242	Tenn.
357	1,092	703	746	837	Texas
48	97	75	79	70	Utah
19	64	47	51	48	Vt.
168	396	259	309	247	Va.
136	331	222	285	286	Wash.
38	132	94	91	87	W. Va.
96	398	268	240	313	Wis.
32	66	51	50	43	Wyo.
6,044	17,574	12,253	2,977	13,153	TOTAL

1985 Motor Bus Registration

	Private and Commercial		Publicly Owned			
	Commercial Buses[1]	School and Other[2]	Federal	School[3]	Total School Buses	Total Buses
Alabama	1,997	180	14	6,189	6,369	8,380
Alaska	1,065	491	55	273	764	1,884
Arizona	1,028	192	335	2,492	2,684	4,047
Arkansas	43	1,053	13	3,891	4,944	5,000
California	12,528	7,782	285	13,840	21,622	34,435
Colorado	812	842	38	4,022	4,864	5,714
Connecticut	2,380	5,298	19	656	5,954	8,353
Delaware	319	1,211	—	150	1,361	1,680
Florida	3,409	1,129	114	31,164	32,293	35,816
Georgia	1,113	2,295	70	11,290	13,585	14,768
Hawaii	2,576	677	18	697	1,374	3,968
Idaho	762	384	139	1,914	2,298	3,199
Illinois	5,287	11,606	55	2,981	14,587	19,929
Indiana	4,263	4,655	31	9,756	14,411	18,705
Iowa	1,071	292	7	7,800	8,092	9,170
Kansas	369	1,139	6	2,329	3,468	3,843
Kentucky	1,116	715	59	7,679	8,394	9,569
Louisiana	862	14,461	24	4,403	18,864	19,750
Maine	160	426	22	1,940	2,366	2,548
Maryland	3,108	3,648	95	4,066	7,714	10,917
Massachusetts	3,530	7,234	18	342	7,576	11,124
Michigan	2,317	6,259	31	13,139	19,398	21,746
Minnesota	2,360	4,290	36	10,080	14,370	16,766
Mississippi	768	2,180	62	5,092	7,272	8,102
Missouri	970	2,848	78	5,863	8,711	9,759
Montana	408	704	67	686	1,390	1,865
Nebraska	475	600	7	3,214	3,814	4,296
Nevada	1,300	142	91	111	253	1,644
New Hampshire	354	926	1	271	1,197	1,552
New Jersey	5,000	7,000	59	3,000	10,000	15,059
New Mexico	503	2,357	390	524	2,881	3,774
New York	11,827	7,555	96	12,725	20,280	32,203
North Carolina	1,899	7,111	41	22,309	29,420	31,360
North Dakota	96	482	27	1,377	1,859	1,982
Ohio	8,331	3,362	37	19,428	22,790	31,158
Oklahoma	360	1,398	125	10,070	11,468	11,953
Oregon	1,399	2,114	57	5,689	7,803	9,259
Pennsylvania	8,108	13,751	108	5,919	19,670	27,886
Rhode Island	350	1,234	5	6	1,240	1,595
South Carolina	874	3,663	17	8,530	12,193	13,084
South Dakota	312	409	40	1,175	1,584	1,936
Tennessee	1,699	1,345	43	8,962	10,307	12,049
Texas	3,119	11,983	189	38,435	50,418	53,726
Utah	319	74	55	706	780	1,154
Vermont	82	480	11	769	1,249	1,342
Virginia	2,183	243	132	11,341	11,584	13,899
Washington	735	2,029	185	7,451	9,480	10,400
West Virginia	878	63	23	2,606	2,669	3,570
Wisconsin	1,529	6,791	30	3,959	10,750	12,309
Wyoming	804	138	1	1,408	1,546	2,351
District of Columbia	2,259	151	261	278	429	2,949
Total	109,416	157,392	3,722	322,997	480,389	593,527

Source: U.S. Department of Transportation, Federal Highway Administration, Table MV-10. [1]Includes municipally-owned transit buses. [2]In some instances, church, industrial and other private buses are included here; and in other instances, privately-owned school buses could not be segregated from commercial buses, and are included with the latter. [3]This column consists primarily of publicly-owned school buses but includes a few privately-owned school, institutional and industrial buses registered free or at a reduced rate.

International Show 'Stats,' by Years

Year	Place	Exhibitors	Booths	Net Square Ft. (Booth Space)	Attendance Total
1933	Chicago	268	562	62,324	10,781
1934	Cleveland	336	798	72,261	13,348
1935	Atlantic City	350	850	92,400	12,761
1936	Chicago	357	915	98,632	13,476
1937	Chicago	380	1,012	110,095	13,045
1938	Chicago	355	947	103,412	15,526
1939	Chicago	351	961	108,413	13,366
1940	Chicago	352	969	117,331	12,925
1946	Atlantic City	430	1,169	126,888	13,712
1947	Chicago	486	1,327	171,978	19,888
1948	Chicago	520	1,444	178,510	19,534
1950	Chicago	522	1,385	172,463	17,067
1952	Atlantic City	460	1,275	143,148	14,049
1953[2]	Chicago	289	440	44,000	4,288
1954[3]	Chicago	478	984	111,978	12,880
1959	Chicago	459	1,004	118,404	21,614
1960	New York	487	1,143	119,066	34,087
1961	Los Angeles	511	1,157		44,309[4]
1962	Chicago	504	1,275	146,926	29,090
1963	Philadelphia	518	1,347	138,844	22,975
1964	San Francisco	579	1,415		53,165[4]
1965	Chicago	542	1,422	148,980	18,177
1966	New York	505	1,139	116,887	17,640
1967	Chicago	548	1,419	146,050	17,379
1968	Las Vegas	560	1,488		19,512
1969	Chicago	516	1,403	145,220	18,449
1970	Las Vegas	576	1,514	136,780	21,157
1971	Chicago	496	1,407	140,700	18,989
1972	Chicago	526	1,444	158,000	20,226
1973	Las Vegas	559	1,579	157,900	25,190
1974	Chicago	510	1,523	157,450	17,219
1975	Chicago	542	1,523	157,550	20,824
1976	San Francisco	560	1,525	152,500	21,795
1977	Chicago	579	1,643	165,200	20,958
1978	Chicago	646	[5]	193,650	23,877
1979	Las Vegas	746	2,016	201,600	28,237
1980	Chicago	684	[5]	201,880	23,156
1981	Chicago	659	[5]	191,000	23,765
1982	Las Vegas	756	2,035	203,500	27,480
1983	Chicago	639	1,921	192,130	30,572
1984	Chicago	705	[5]	201,950	32,822[6]
1985	Las Vegas	791	2,215	221,500	30,555
1986	Chicago	728	[5]	221,300	35,428
1987	Atlanta	801	[5]	233,050	25,329

Sources: Hall-Erickson, Inc. and JOBBER TOPICS. [1]The exhibit is commonly called the Big "I" Show when staged in Chicago, but International Automotive Aftermarket Show when staged in Las Vegas or other western sites. [2]Indicates booth conference only. [3]Indicates trade show plus booth conference. [4]Attendance figures for 1961 and 1964 are "turnstyle" counts, not an actual badge count. For years 1962 through 1983 the figure is a badge count. [5]Show officials discontinued reporting the number of show booths for the years indicated. [6]Attendance figure based on total registrations, not a badge count.

U.S.-Canadian Trade in Automotive Products, 1985-1986

Canada Imports From U.S. ($000,000)

	1985	1986[1]	Percent Change
Cars	$ 8,566	$ 9,100	6.2
Trucks	2,570	2,775	8.0
Parts	17,438	18,300	4.9
Tires & Tubes	264	300	13.6
TOTAL	28,838	30,475	5.7

U.S. Imports From Canada ($000,000)

Cars	$15,277	$16,820	10.1
Trucks	6,422	6,450	0.4
Parts	11,512	11,650	1.2
Tires & Tubes	592	650	9.8
TOTAL	33,803	35,570	5.2

Balance ($000,000)

Cars	$ 6,711	$ 7,720
Trucks	3,852	3,675
Parts	−5,926	−6,650
Tires & Tubes	328	350
TOTAL	4,965	5,095

Source: Statistics Canada. [1]Figures for 1986 are estimated.

Vehicle Production Milestones[1]

(Cars, Trucks & Buses Combined)

1906	100,000th
1912	1 millionth
1920	10 millionth
1931	50 millionth
1948	100 millionth
1955	150 millionth
1962	200 millionth
1968	250 millionth
1972	300 millionth
1982	400 millionth

Source: Motor Vehicle Manufacturers Assn. of the U.S., Inc., and *Ward's Automotive Reports*. [1]Based upon U.S. total factory sales data.

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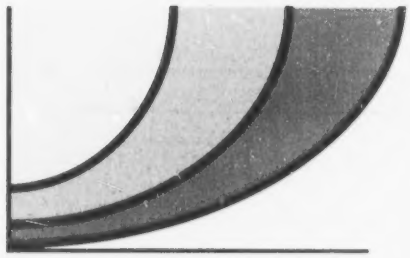
AUTOMOTIVE PRODUCT STATISTICS

Product Statistics Section



The following section of the JOBBER TOPICS 53rd Annual Marketing Directory contains 20 pages of product statistics. Harvey Research Organization, an independent research firm located in Rochester, NY, was commissioned to conduct this survey to determine automotive jobbers' impact on the American economy. The twenty product lines come from ASIA's 1985 Leading Line Study.

A dollar incentive and two mailings yielded a 57 percent rate of return, offering assurance that the statistical results within this survey may be accepted as accurate within + or - 3 percentage points at the 95% confidence level.

Each page features one product line with survey results covering: product performance by jobber sales volume and geographical region; approximate percentage of product sold for domestic versus import use; percentage of product sold to garages, service stations, tire dealers, DIYers and others; and the percentage of respondents purchasing the product from a warehouse distributor versus direct from the manufacturer.

Finally, an analysis of product line sales volume is offered, based on ASIA's percentage of total jobber sales. It should be noted that these figures are rough estimates, combining fresh data from JOBBER TOPICS with ASIA's 1985 Leading Lines Survey. However, because the circulation of JOBBER TOPICS magazine truly reflects the universe of wholesalers in this country, and because this Harvey Research study is statistically projectable for this sample, these dollar sales volume estimates are a good approximation of real industry figures.

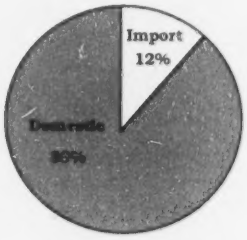
The Editors

Air Conditioners & Parts

Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	17%	22%	24%
Decreased	32	34	30
Steady	31	28	29

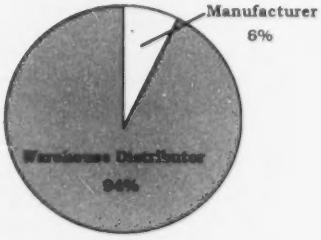
Domestic/Import Sales Mix



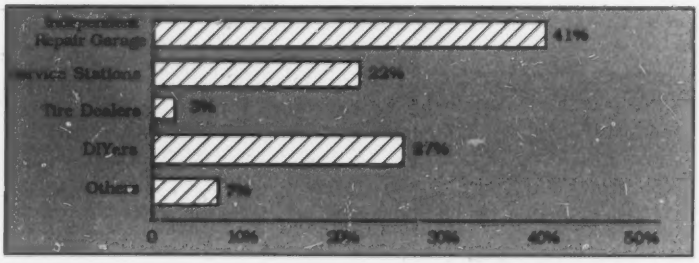
Product Performance By Region

Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	18%	12%	14%	28%	28%	28%	28%	27%	13%
Decreased	27	31	32	22	29	43	28	30	40
Steady	38	32	28	31	32	25	33	19	27

Jobber's Supplier



Product Sales By Type of Customer



Analysis:

According to ASIA's 1985 Leading Line survey, air conditioners & parts account for 2.37% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $11,068 worth of air conditioners & parts each year.

Based on 26,636 jobbing facilities in U.S., the wholesale air conditioner & parts market represents $294,804,584.

Regions:

Methodology:

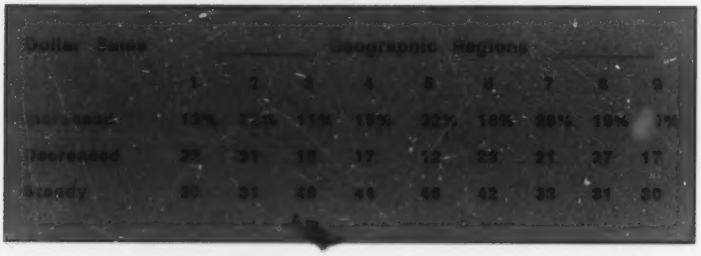
An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Abrasives & Adhesives

Product Performance By Sales Volume

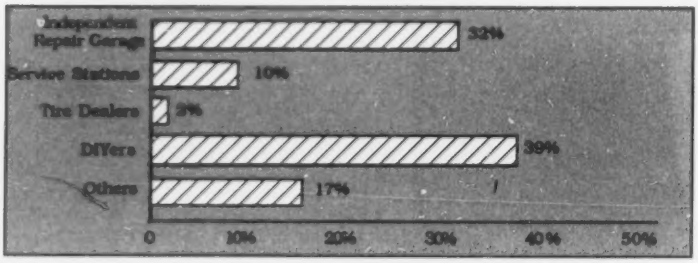
Dollar Sales	Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	9%	28%	38%
Decreased	20	25	20
Steady	47	38	34

Product Performance By Region

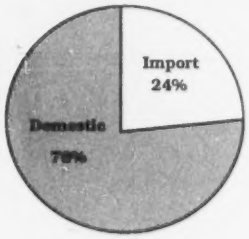


Dollar Sales	Geographic Regions								
	1	2	3	4	5	6	7	8	9
Increased	13%	22%	11%	15%	32%	16%	28%	19%	7%
Decreased	25	31	18	17	12	33	21	27	17
Steady	30	31	48	44	48	42	33	31	30

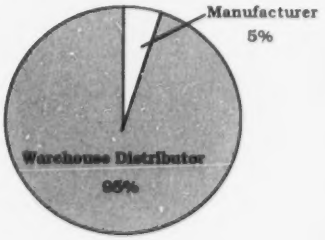
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier

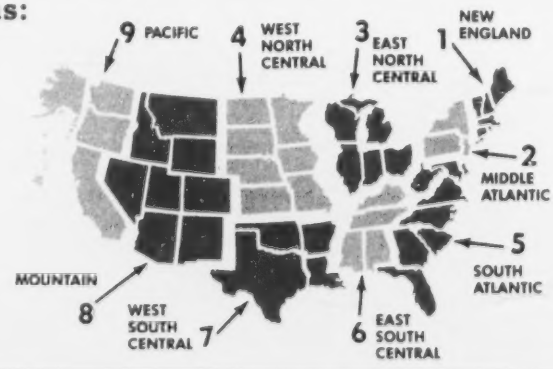


Analysis:

According to ASIA's 1985 Leading Line survey, abrasives & adhesives account for 1.57% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $7,331 worth of abrasives & adhesives each year.

Based on 26,636 jobbing facilities in U.S., the wholesale abrasive & adhesive market represents $195,292,488.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Anti-Freeze

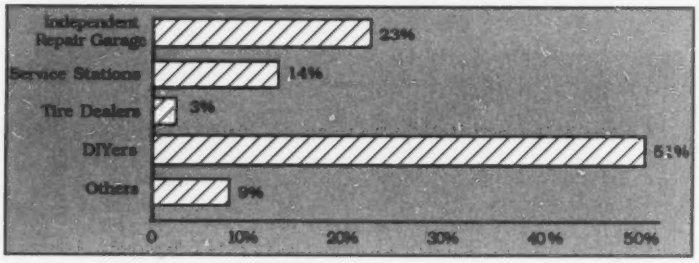
Product Performance By Sales Volume

	Jobber Sales Volume		
Dollar Sales	Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	22%	38%	34%
Decreased	38	20	18
Steady	36	40	37

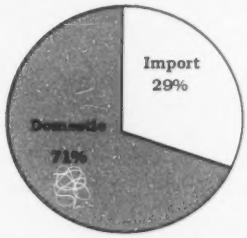
Product Performance By Region

Dollar Sales	Geographic Regions								
	1	2	3	4	5	6	7	8	9
Increased	43%	32%	24%	27%	30%	27%	38%	19%	30%
Decreased	13	15	19	29	37	29	21	31	3
Steady	30	43	38	34	26	40	35	39	60

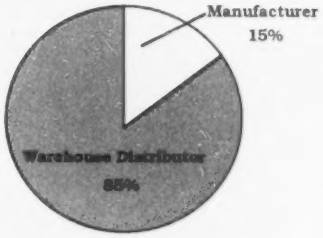
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier

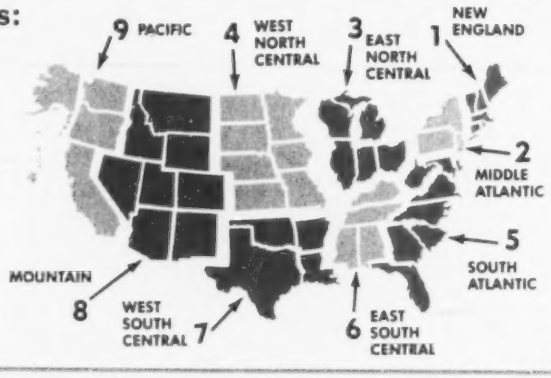


Analysis:

According to ASIA's 1985 Leading Line survey, anti-freeze accounts for .87% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $4,063 worth of anti-freeze each year.

Based on 26,636 jobbing facilities in U.S., the wholesale anti-freeze market represents $108,219,404.

Regions:



Methodology:

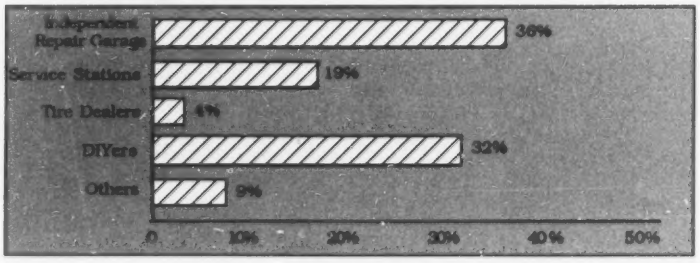
An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Bearings (other than engine)

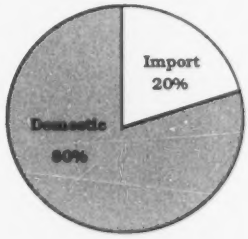
Product Performance By Sales Volume

Product Performance By Region

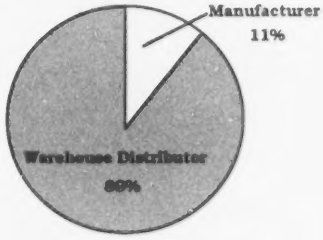
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier

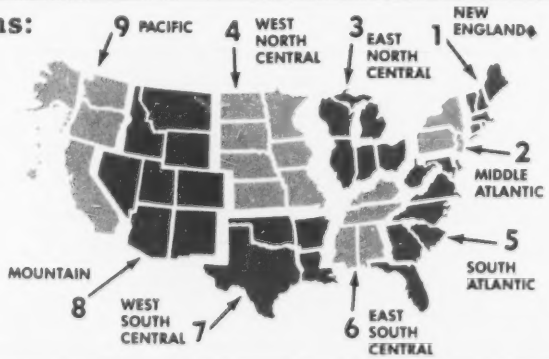


Analysis:

According to ASIA's 1985 Leading Line survey, bearings (other than engine) account for 1.56% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $7,285 worth of bearings (other than engine) each year.

Based on 26,636 jobbing facilities in U.S., the wholesale bearing (other than engine) market represents $194,048,587.

Regions:



Methodology:

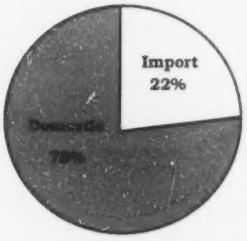
An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Belts & Hoses

Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $850,000	$850,000 or more
Increased	38%	62%	63%
Decreased	18	10	9
Steady	39	25	21

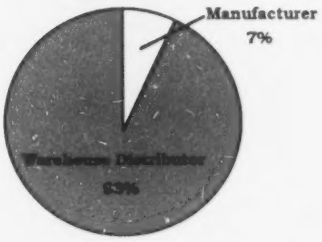
Domestic/Import Sales Mix



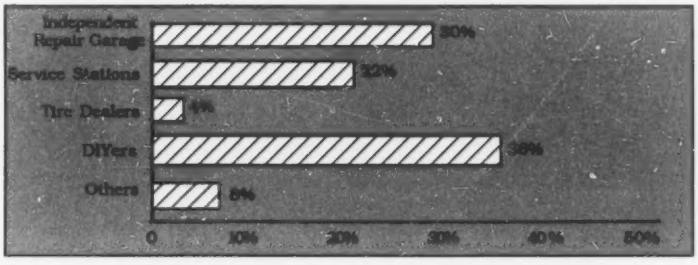
Product Performance By Region

Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	67%	60%	47%	56%	57%	48%	50%	35%	50%
Decreased	13	5	12	12	12	22	11	35	3
Steady	17	25	32	27	29	30	25	31	38

Jobber's Supplier



Product Sales By Type of Customer

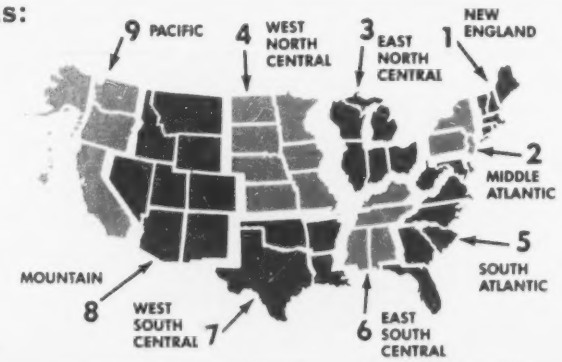


Analysis:

According to ASIA's 1985 Leading Line survey, belts & hoses account for 6.11% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $28,533 worth of belts & hoses each year.

Based on 26,636 jobbing facilities in U.S., the wholesale belts & hoses market represents $760,023,633.

Regions:



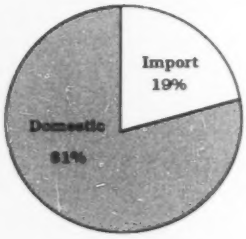
Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Brake Drums & Rotors

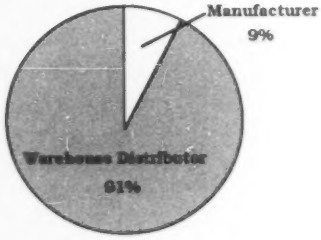
Product Performance By Sales Volume

Domestic/Import Sales Mix

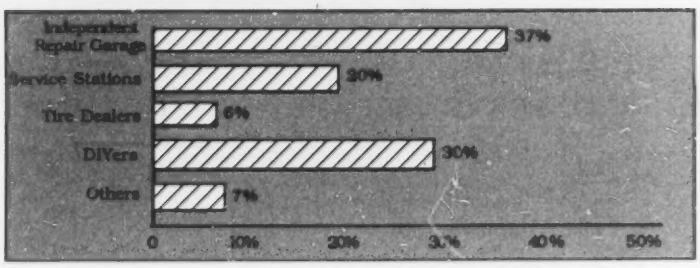


Product Performance By Region

Jobber's Supplier



Product Sales By Type of Customer

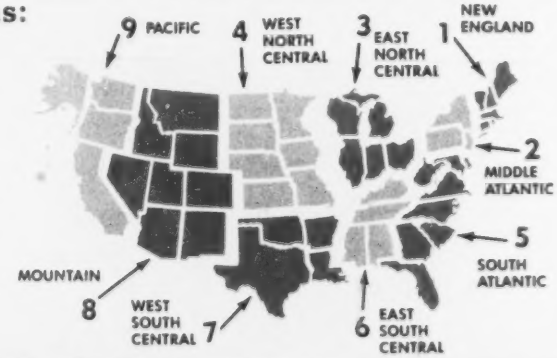


Analysis:

According to ASIA's 1985 Leading Line survey, brake drums & rotors account for 1.44% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $6,725 worth of brake rotors & drums each year.

Based on 26,636 jobbing facilities in U.S., the wholesale brake rotor & drum market represents $179,121,773.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Brake Shoes, Pads & Linings

Product Performance By Sales Volume

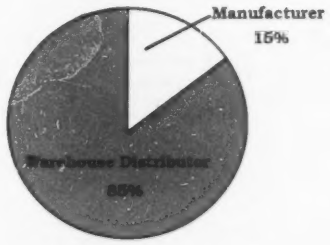
Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	43%	54%	65%
Decreased	24	9	8
Steady	33	28	21

Domestic/Import Sales Mix

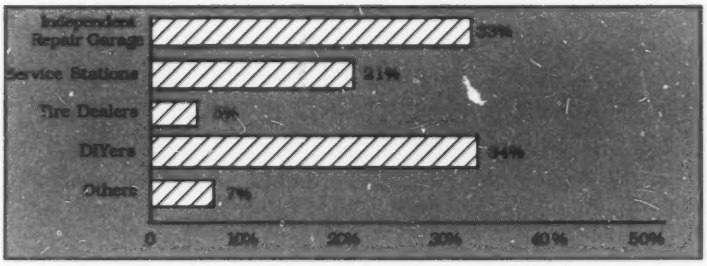
Product Performance By Region

Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	67%	57%	58%	63%	54%	45%	67%	54%	53%
Decreased	10	8	8	7	8	17	4	27	24
Steady	17	24	27	34	32	37	20	19	23

Jobber's Supplier



Product Sales By Type of Customer

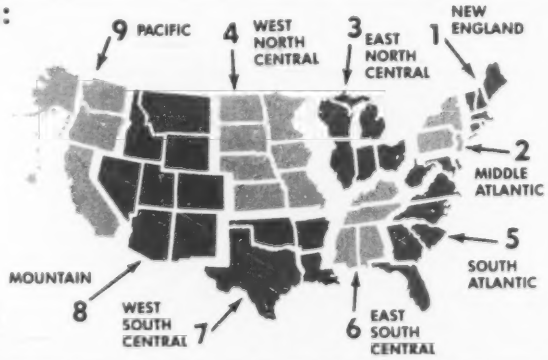


Analysis:

According to ASIA's 1985 Leading Line survey, brake shoes, pads & linings account for 3.92% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $18,306 worth of brake shoes, pads & linings each year.

Based on 26,636 jobbing facilities in U.S., the wholesale brake shoe, pad & lining market represents $487,609,270.

Regions:

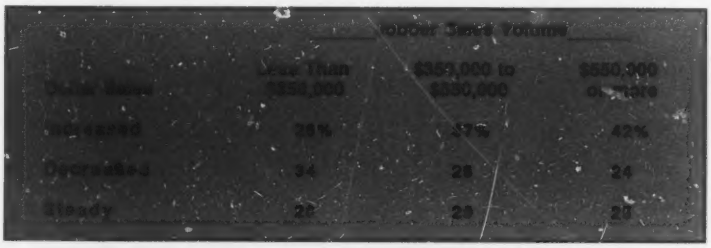


Methodology:

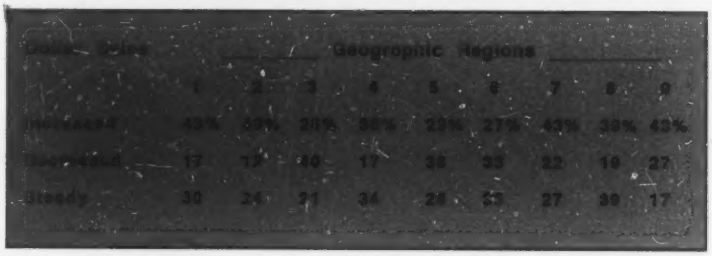
An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Batteries

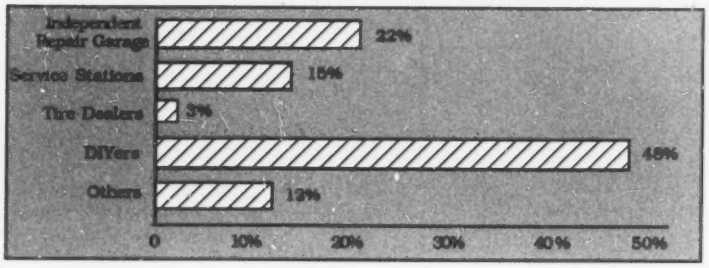
Product Performance By Sales Volume



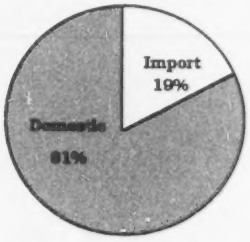
Product Performance By Region



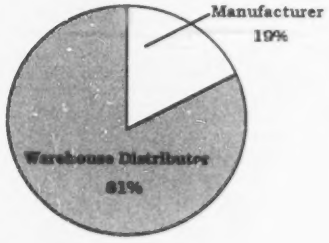
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier

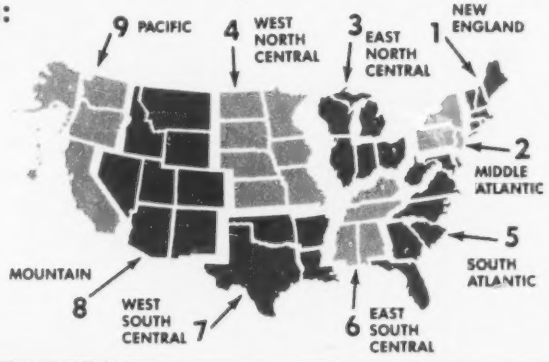


Analysis:

According to ASIA's 1985 Leading Line survey, batteries account for 4.96% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $23,163 worth of batteries each year.

Based on 26,636 jobbing facilities in U.S., the wholesale battery market represents $616,974,995.

Regions:



Methodology:

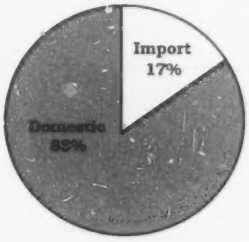
An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Carburetors, Kits & Parts

Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	29%	40%	42%
Decreased	28	22	15
Steady	38	38	33

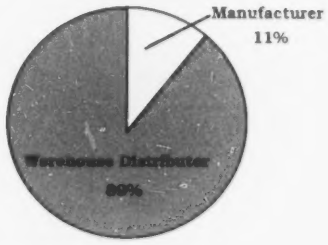
Domestic/Import Sales Mix



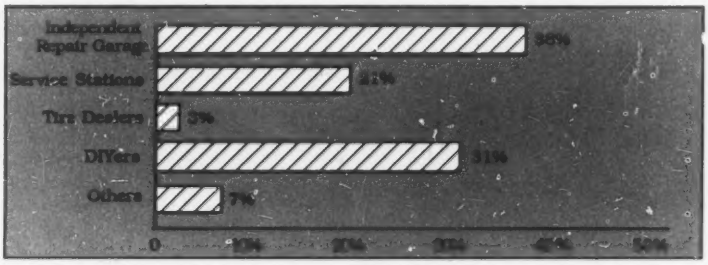
Product Performance By Region

Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	50%	35%	40%	44%	34%	38%	40%	31%	30%
Decreased	30	21	15	7	19	29	26	19	23
Steady	33	32	32	34	43	32	27	46	43

Jobber's Supplier



Product Sales By Type of Customer

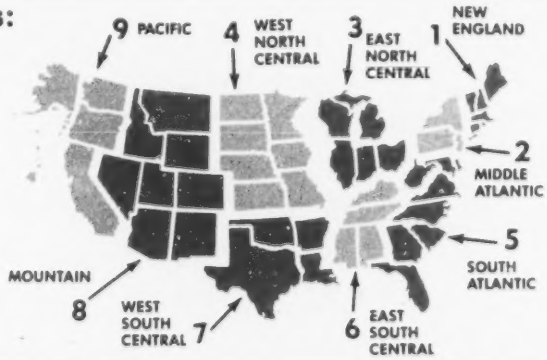


Analysis:

According to ASIA's 1985 Leading Line survey, carburetors, kits & parts account for 2.18% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $10,180 worth of carburetors, kits & parts each year.

Based on 26,636 jobbing facilities in U.S., the wholesale carburetor, kit and part market represents $271,170,461.

Regions:



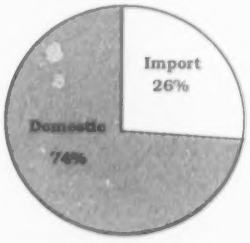
Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Caps, Rotors, Condensers & Distributors

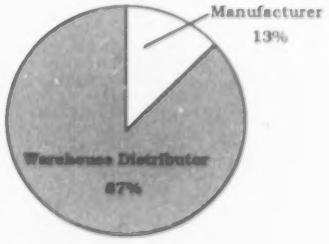
Product Performance By Sales Volume

Domestic/Import Sales Mix

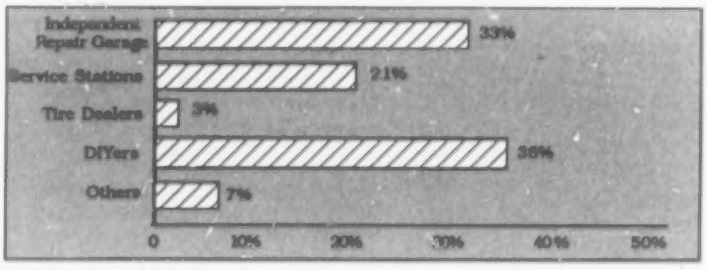


Product Performance By Region

Jobber's Supplier



Product Sales By Type of Customer



Analysis:

According to ASIA's 1985 Leading Line survey, caps, rotors, condensers & distributors account for 3.34% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $15,598 worth of caps, rotors, condensers & distributors each year.

Based on 26,636 jobbing facilities in U.S., the wholesale cap, rotor, condenser & distributor market represents *$415,463,000.

Regions:

Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Clutches & Parts

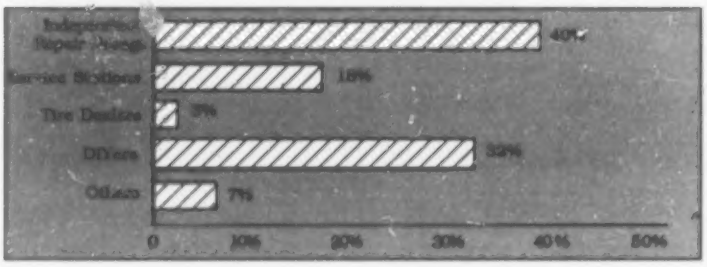
Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	26%	33%	48%
Decreased	26	17	8
Steady	34	42	33

Product Performance By Region

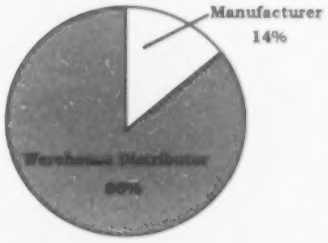
Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	53%	42%	31%	36%	39%	31%	38%	39%	40%
Decreased	19	9	14	14	16	35	15	27	17
Steady	17	29	42	37	39	27	43	31	38

Product Sales By Type of Customer



Domestic/Import Sales Mix

Jobber's Supplier

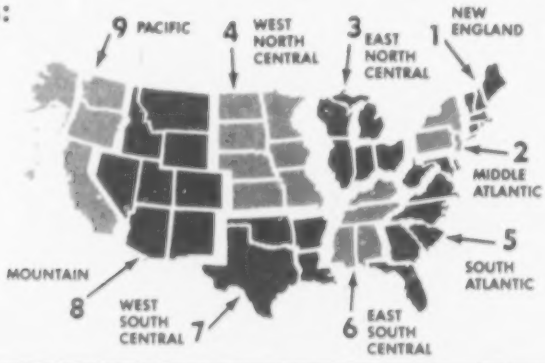


Analysis:

According to ASIA's 1985 Leading Line survey, clutches & parts account for 1.32% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $6,164 worth of clutches & parts each year.

Based on 26,636 jobbing facilities in U.S., the wholesale clutches & parts market represents $164,194,958.

Regions:

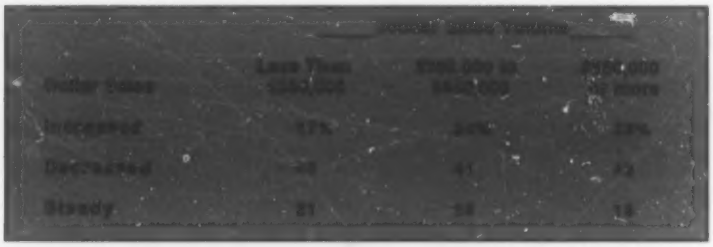


Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

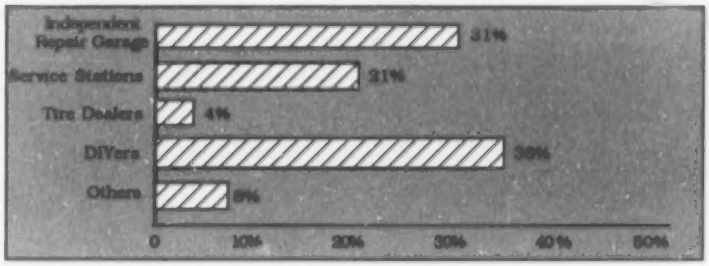
Exhaust System Parts

Product Performance By Sales Volume

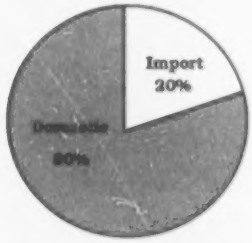


Product Performance By Region

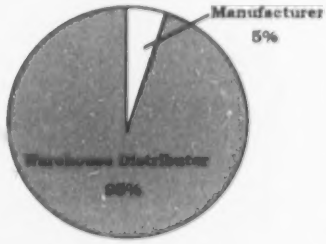
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier

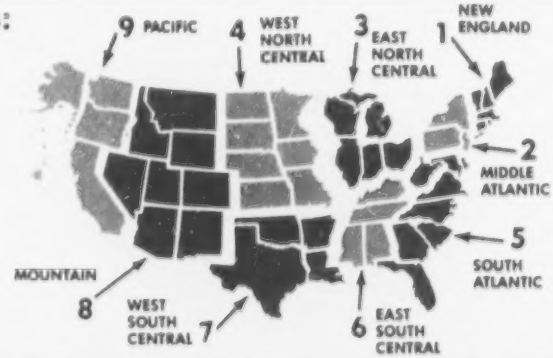


Analysis:

According to ASIA's 1985 Leading Line survey, exhaust system parts account for 4.82% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $22,509 worth of exhaust system parts each year.

Based on 26,636 jobbing facilities in U.S., the wholesale exhaust system parts market represents $599,560,378.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Filters and Cartridges

Product Performance By Sales Volume

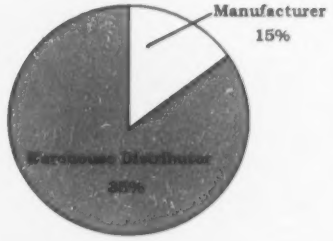
Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	43%	59%	57%
Decreased	22	13	13
Steady	33	28	26

Domestic/Import Sales Mix

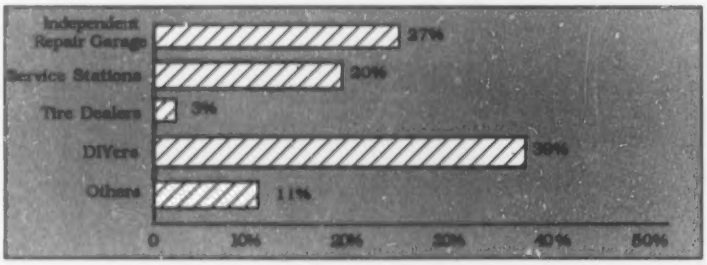
Product Performance By Region

Dollar Sales	Geographic Regions 1	2	3	4	5	6	7	8	9
Increased	70%	57%	41%	48%	55%	38%	62%	54%	70%
Decreased	10	8	18	17	17	32	12	15	13
Steady	17	35	34	29	26	29	24	31	17

Jobber's Supplier



Product Sales By Type of Customer



Analysis:

According to ASIA's 1985 Leading Line survey, filters and cartridges account for 6.80% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $31,756 worth of filters and cartridges each year.

Based on 26,636 jobbing facilities in U.S., the wholesale filter and cartridge market represents $845,852,816.

Regions:

Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Gaskets

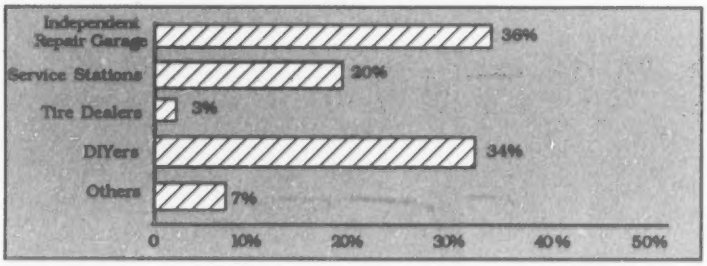
Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $250,000	$250,000 to $550,000	$550,000 or more
Increased	36%	57%	45%
Decreased	15	19	11
Steady	49	39	36

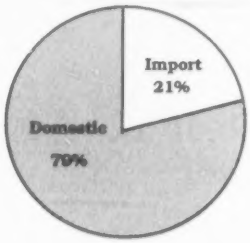
Product Performance By Region

Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	47%	57%	54%	44%	42%	27%	51%	39%	30%
Decreased	13	4	11	12	13	35	19	15	13
Steady	40	40	45	34	41	39	29	39	53

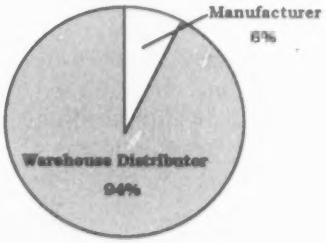
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier

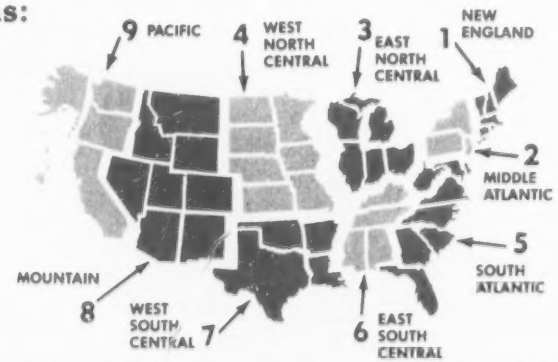


Analysis:

According to ASIA's 1985 Leading Line survey, gaskets account for 2.07% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $9,666.90 worth of gaskets each year.

Based on 26,636 jobbing facilities in U.S., the wholesale gasket market represents $257,487,548.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Sealed Beams

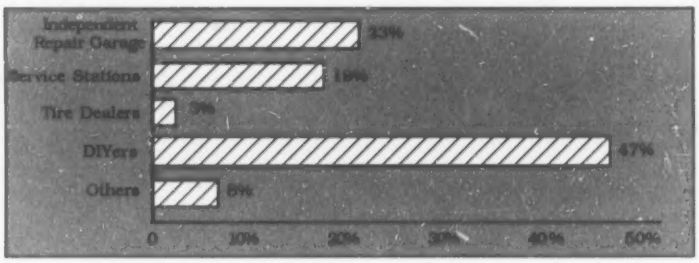
Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	39%	67%	55%
Decreased	17	8	11
Steady	37	30	28

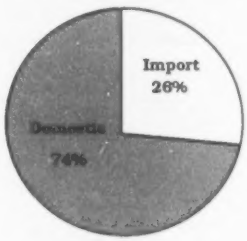
Product Performance By Region

Dollar Sales	Geographic Regions 1	2	3	4	5	6	7	8	9
Increased	57%	66%	39%	46%	48%	40%	59%	46%	33%
Decreased	--	5	13	17	7	23	12	27	3
Steady	27	17	36	27	41	32	24	27	57

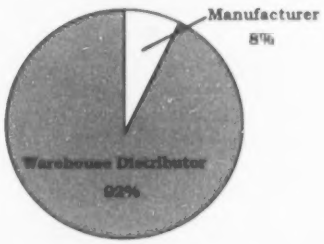
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier

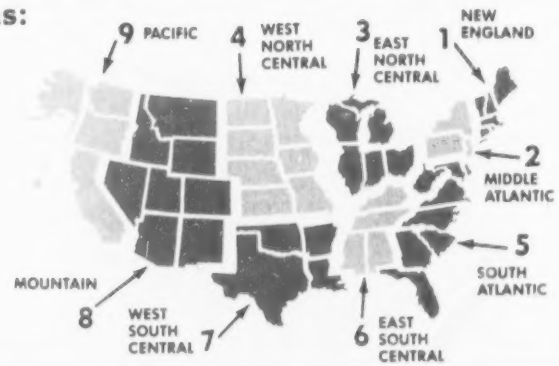


Analysis:

According to ASIA's 1985 Leading Line survey, sealed beams account for 1.11% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $5,183 worth of sealed beams each year.

Based on 26,636 jobbing facilities in U.S., the wholesale sealed beam market represents $138,073,033.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Spark Plugs

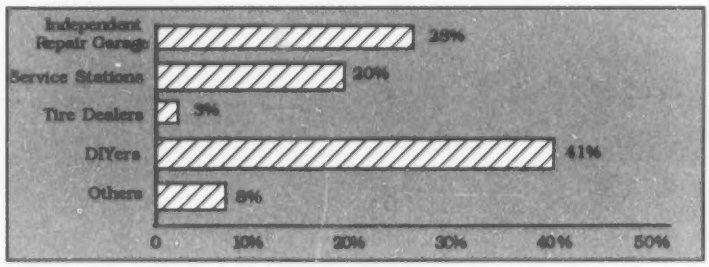
Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $250,000	$250,000 to $500,000	$500,000 or more
Increased	25%	29%	31%
Decreased	33	29	29
Steady	42	48	34

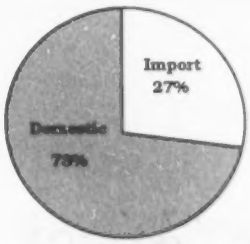
Product Performance By Region

Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	40%	31%	24%	27%	24%	21%	35%	39%	30%
Decreased	17	24	27	31	29	38	24	35	17
Steady	43	35	49	38	43	38	38	31	53

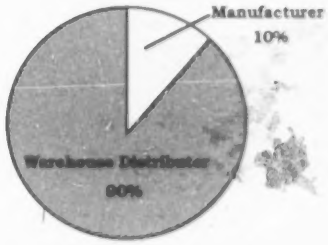
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier



Analysis:

According to ASIA's 1985 Leading Line survey, spark plugs account for 3.22% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $15,037 worth of spark plugs each year.

Based on 26,636 jobbing facilities in U.S., the wholesale spark plug market represents $400,536,186.

Regions:

Methodology:

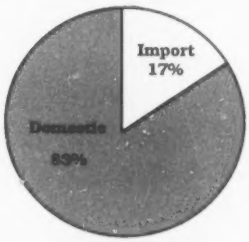
An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Timing Gears & Chains

Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	32%	46%	45%
Decreased	18	14	10
Steady	38	34	31

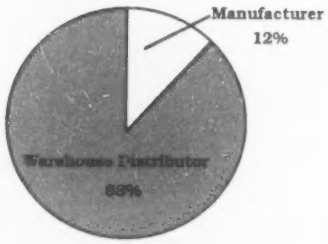
Domestic/Import Sales Mix



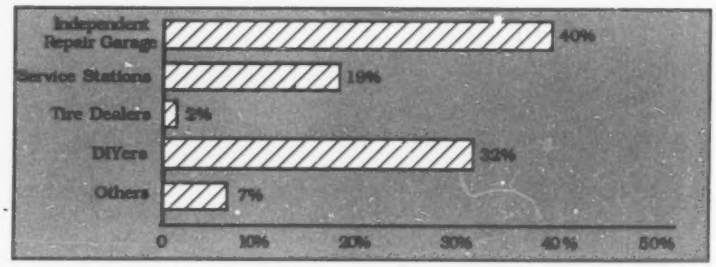
Product Performance By Region

Dollar Sales	Geographic Regions 1	2	3	4	5	6	7	8	9
Increased	47%	42%	35%	46%	43%	31%	45%	39%	43%
Decreased	13	10	7	12	12	29	16	10	17
Steady	27	32	45	24	35	35	31	27	33

Jobber's Supplier



Product Sales By Type of Customer



Analysis:

According to ASIA's 1985 Leading Line survey, timing gears & chains account for .70% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $3,269 worth of timing gears & chains each year.

Based on 26,636 jobbing facilities in U.S., the wholesale timing gear & chain market represents $87,073,084.

Regions:

Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Tie Rod Ends & Idler Arms

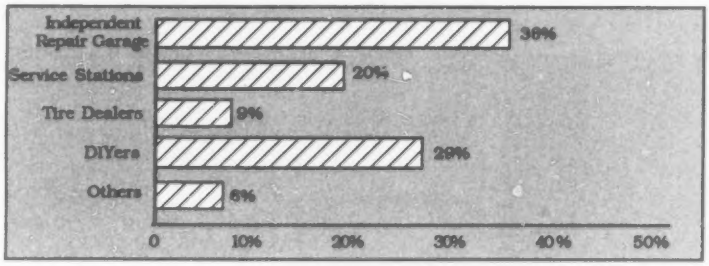
Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	34%	32%	44%
Decreased	22	29	11
Steady	41	37	31

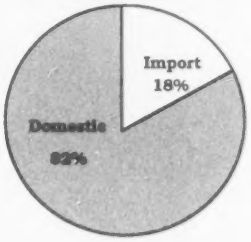
Product Performance By Region

Dollar Sales	Geographic Regions: 1	2	3	4	5	6	7	8	9
Increased	47%	35%	27%	38%	37%	27%	38%	46%	23%
Decreased	10	15	11	12	16	29	27	15	40
Steady	17	20	16	15	8	7	6	12	10

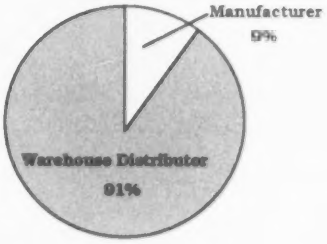
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier



Analysis:

According to ASIA's 1985 Leading Line survey, tie rod ends and idler arms account for .84% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $3,922 worth of tie rod ends and idler arms each year.

Based on 26,636 jobbing facilities in U.S., the wholesale tie rod end and idler arm market represents $104,487,700.

Regions:

Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Wire & Cable

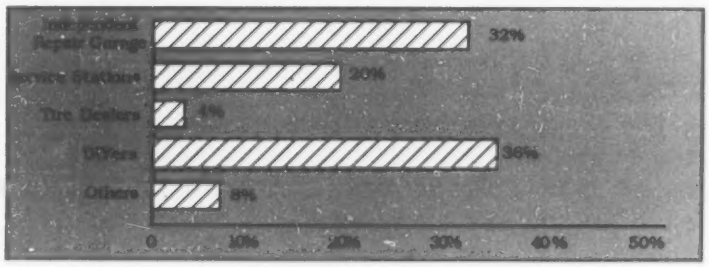
Product Performance By Sales Volume

Dollar Sales	Jobber Sales Volume: Less Than $350,000	$350,000 to $550,000	$550,000 or more
Increased	24%	38%	37%
Decreased	22	14	15
Steady	47	42	41

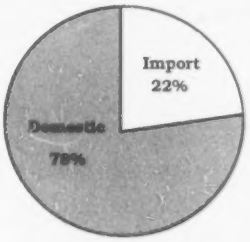
Product Performance By Region

Dollar Sales	Geographic Regions 1	2	3	4	5	6	7	8	9
Increased	54%	38%	26%	29%	26%	29%	40%	35%	33%
Decreased	13	9	18	17	19	27	17	31	10
Steady	30	42	47	44	48	42	37	31	53

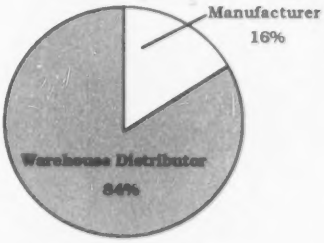
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier

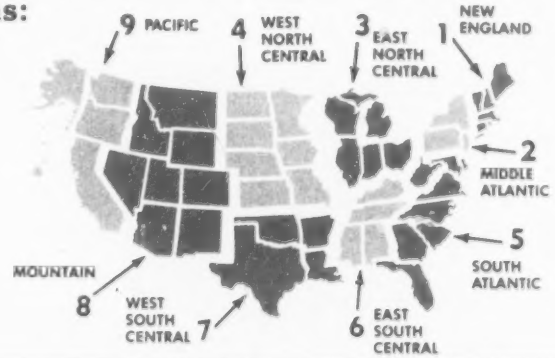


Analysis:

According to ASIA's 1985 Leading Line survey, wire & cable accounts for 2.34% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $10,927 worth of wire & cable each year.

Based on 26,636 jobbing facilities in U.S., the wholesale wire & cable market represents $291,072,880.

Regions:



Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.

Wiper Blades & Arms

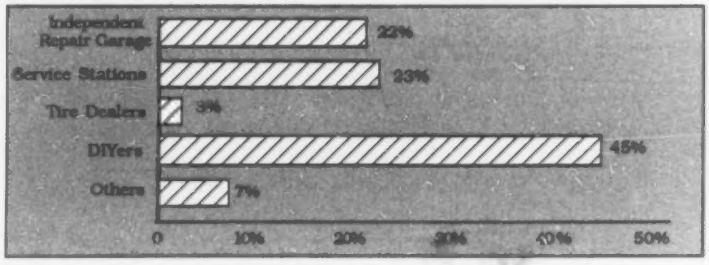
Product Performance By Sales Volume

Dollar Sales	Less Than $250,000	$250,000 to $500,000	$500,000 or more
Increased	34%	38%	48%
Decreased	18	10	10
Steady	48	52	35

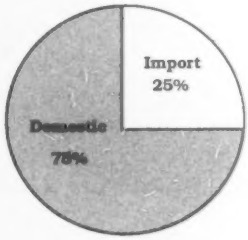
Product Performance By Region

Dollar Sales	Geographic Regions								
	1	2	3	4	5	6	7	8	9
Increased	37%	48%	33%	42%	28%	42%	60%	35%	33%
Decreased	--	4	13	14	19	17	5	19	23
Steady	27	35	42	37	48	38	33	38	40

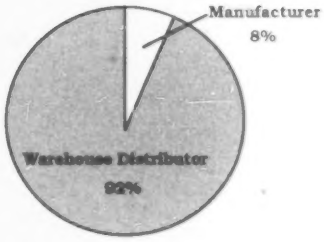
Product Sales By Type of Customer



Domestic/Import Sales Mix



Jobber's Supplier



Analysis:

According to ASIA's 1985 Leading Line survey, wiper blades & arms account for 1.08% of total sales. The median annual sales volume for a jobber is $467,000. Therefore, the average jobber sells $5,043 worth of wiper blades & arms each year.

Based on 26,636 jobbing facilities in U.S., the wholesale wiper blade & arm market represents $134,341,329.

Regions:

Methodology:

An independent mail survey conducted by Harvey Research of Rochester, NY. Based on a random sample of 1,500 JOBBER TOPICS readers. A dollar incentive and a follow-up mailing earned a 57 % return. These figures are statistically projectable within +/- 3 percentage points at the 95% confidence level.